

# HRMS End User Training



## HRMS Organizational Management Level 1 Training Guide

# Table of Contents

Course Objectives.....	3
<b>Section 1: Organizational Overview</b> .....	9
<b>Section 2: Organizational Units</b> .....	37
Section 2a: Create Organizational Unit.....	43
Section 2b: Maintain Organizational Unit.....	56
Section 2c: Delimit Organizational Unit.....	64
<b>Section 3: Positions</b> .....	75
Section 3a: Create Position Action.....	83
Section 3b: Maintain Positions.....	110
Section 3c: Delimit Positions.....	116
<b>Section 4: Organizational Management Reports</b> .....	124
Complete Position Description (S_AHR_61016511).....	129
Display Structure (PPSS).....	134
Structure Display / Maintenance (S_AHR_61016528).....	138
Organizational Management Transactions Reports (ZHR_RPTOMN01).....	142
IT1018 Position Cost Distribution (ZHR_RPTFI0027).....	145
Washington Management Services Employee Report (ZHR_RPTPA802).....	152
Other Organizational Management Reports (Business Intelligence).....	157
<b>Helpful Hints</b> .....	163
<b>Other Available Reports</b> .....	167

# Introduction

- ❖ Name
- ❖ Agency
- ❖ Agency Role
- ❖ Goal for class



# Course Objectives

Upon completion of this course, you will be able to:

- Describe an overview of organizational management
- Explain the basic organizational management concepts and terms
- Perform the organizational unit and position exercises outlined in the Activity Guide
- Explain the organizational management integration with Personnel Administration
- Prepare organizational management reports

# Training Materials and Tools

The following training materials and tools are used:

- **HRMS Training Guide:** Designed to introduce you to basic HRMS navigation terms and concepts and to provide the necessary information to complete the activities and exercises throughout the course.
- **HRMS Activity Guide:** Designed to provide you with activities and exercises that help solidify your understanding of concepts learned in the course and also provide you with an opportunity to use HRMS.
  - Activities include Demonstrations, Walkthroughs and Exercises.

# Job Aids

The following job aids are available to you and are applicable to Organizational Management:

- Organizational Management
- HRMS Basic Navigation
- General Reporting
- Accessing HRMS
- Financial Reporting



The screenshot shows the Washington State Department of Personnel HRMS website. The header includes the HR logo, navigation links (Home, Strategic HR, Compensation & Job Classes, Training, Recruitment, Rules, Diversity, Payroll, More DOP Services), and a search bar. The left sidebar lists 'Payroll - HRMS' with sub-links for HRMS Support, Payroll Calendars & Schedules, Training, and On-Line Quick Reference. The main content area is titled 'Job Aids' and contains a section for 'HRMS End User Job Aids' with a description and a 'Contact Us' box. Below this is a table of job aids.

Job Aids	Format	Date
Access HRMS	<a href="#">PPT</a> <a href="#">PDF</a>	4/04/07
Basic Navigation	<a href="#">PPT</a> <a href="#">PDF</a>	4/04/07
Employee Hiring and Processing	<a href="#">PPT</a> <a href="#">PDF</a>	1/22/08
Financial Reporting	<a href="#">PPT</a> <a href="#">PDF</a>	5/14/07
Garnishments	<a href="#">PPT</a> <a href="#">PDF</a>	1/16/08
General Reporting	<a href="#">PPT</a> <a href="#">PDF</a>	4/04/07
HRMS Benefits	<a href="#">PPT</a> <a href="#">PDF</a>	1/23/08
HRMS Payroll and Reports	<a href="#">PPT</a> <a href="#">PDF</a>	9/29/08

website address: <http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference>

# On-line Quick Reference

**OLQR is an acronym for the On-line Quick Reference tool.**

It contains a glossary, job aids, system and user procedures that describe how to perform HRMS tasks step-by-step.

The screenshot shows the Washington State Department of Personnel (HR) website. The top navigation bar includes links for Contact DOP, About Us, Topic Index A-Z, Forms, Publications, and Calendar. The main navigation menu features buttons for Home, Strategic HR, Compensation & Job Classes, Training, Recruitment, Rules, Diversity, Payroll, and More DOP Services. The Payroll - HRMS section is highlighted, showing links for HRMS Support, Payroll Calendars & Schedules, Training, and On-Line Quick Reference. The On-Line Quick Reference page is displayed, featuring a description of the tool, a list of related documents, and contact information. The page is updated as of 3/9/09.

Washington State Department of Personnel

Home Strategic HR Compensation & Job Classes Training Recruitment Rules Diversity Payroll More DOP Services

Home > Payroll > Human Resource Management System > On-Line Quick Reference [Print Friendly](#)

### On-Line Quick Reference

The On-Line Quick Reference (OLQR) contains instructional materials to help you perform day-to-day tasks in the Human Resource Management System (HRMS).

It is organized by functional areas and roles, job aids, HRMS reports, user procedures, course manuals, and glossary.

- [Functional Areas and Roles](#)
- [Job Aids](#)
- [HRMS Reports](#)
- [User Procedures](#)
- [Course Manuals](#)
- [Glossary](#)

Updated: 3/9/09

**Related Documents**  
[HRMS Upgrade Impacts](#)

**Contact Us**  
360-664-6400 or [E-Mail](#)

website address: <http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference>

# HRMS Data Definitions

## HRMS Data Definitions

**website** provides agencies with standard definitions of HRMS fields names and dropdown list options.



website address:

<http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference/Pages/HRMSDataDefinitions.aspx>



# HRMS Support

The **HRMS Support** website is a point of contact for internal and external clients of DOP's Information systems, websites and internal networks.



website address: <http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference>

# **Section 1: Organizational Management Overview**

# Organizational Management Overview

Upon completion of this section, you will be able to:

- Define the organizational management concepts and key terms
- List and explain the organizational management roles
- Discuss the integration of Organizational Management with other HRMS components.
- Explain the overall process of Organizational Management.



# Key Terms



## Organizational Management

Process used to create and maintain organizational structures and their associated org. units, positions, and jobs in HRMS.

## Organizational Structure

Made up of organizational units, positions, jobs, people, and cost centers and how they relate to each other to form a hierarchical structure.

## Business Area

A specific agency in the State of Washington

## Personnel Area

A specific agency/sub-agency in the State of Washington.

# Key Terms – cont'd

## Personnel Sub-area

---

A subdivision of Personnel Area that identifies Bargaining Units, WMS, Exempt and Non-Represented positions.

## Employee Group

Status of an employee or position within the State of Washington.

## Employee Sub-group

A sub-division of Employee Group which defines work period designation and salary rate unit.

---



# Key Terms – cont'd

## Organizational Unit

Represents departments, regions, divisions, units or other groupings within an agency.

## Organizational Relationships

Describes how organizational management objects are related to each other.

## Attributes

Information that defines the org unit, position or job.



# Key Terms – cont'd

---

An individual element of information which exists in HRMS.

## Object

- Examples are: org units, jobs, positions, cost centers

## Cost Center

An object in HRMS that represents a defined location of cost incurrence.

- Example – Organizational Index



# Organizational Security Levels

- Organizational Security Levels identify the highest level org unit an end user can access to view, create, and/or modify employee data.
- There are three Security levels in HRMS.
  - 1<sup>st</sup> Level Statewide Access
    - Allows an end user to view information for all agencies and employees. Most central service agencies, such as DRS, HCA, and OFM, have statewide access.
  - 2<sup>nd</sup> Level Agency Access
    - Allows an end user to view information for a specific Personnel Area. This is the default and most common for State agencies.
  - 3rd Level Org Unit Access
    - The most restrictive. It allows an agency to restrict end user access to a single org unit within the Personnel Area and any org units below it. It must report directly to the top org unit.
  - **Important: Agencies adding or deleting 3rd level Org Units must coordinate with DOP to ensure Security Access Profiles are updated.**



State of  
Washington  
(SOW)

Dept. of  
Personnel

ISD

Helpdesk

# HRMS Roles

- HRMS has role-based security
- System security dictates the information that you can update
- Your agency assigned your role based on what tasks you perform
- There are agency-level and centralized roles



# Organizational Management Roles

## ■ Organizational Management Processor (Decentralized)

- Creates and maintains the organizational structure, org units and positions within an agency.

## ■ Organizational Management Inquirer

- Views organizational information as it is entered in HRMS.

## ■ Compensation Analyst (Centralized)

- Creates and maintains jobs.
- Establishes new Personnel Areas in HRMS.



# Integration With Other HRMS Components

- HRMS is a very integrated system, with the ability to share data with other HRMS components.
- It allows real-time access from Organizational Management data to:
  - Personnel Administration
  - Payroll
  - Compensation and Benefits
  - Time Management



# Integration With Other HRMS Components – cont'd

- When a position is created in HRMS, many attributes are inherited by an employee when appointed to the position.
  - Employees are compensated based on the job they hold.
- Reports can be generated based on an agency's organizational structure.

# Benefits of HRMS

- Improved data integrity
  - Default values are based on business rules
  - Defined values can be setup as a list for users and agencies to choose from
- Agencies can view a “snapshot” of their organization at any point in time
  - Identify vacant or filled positions
- Agencies have a complete model of the organization and reporting structure in one place

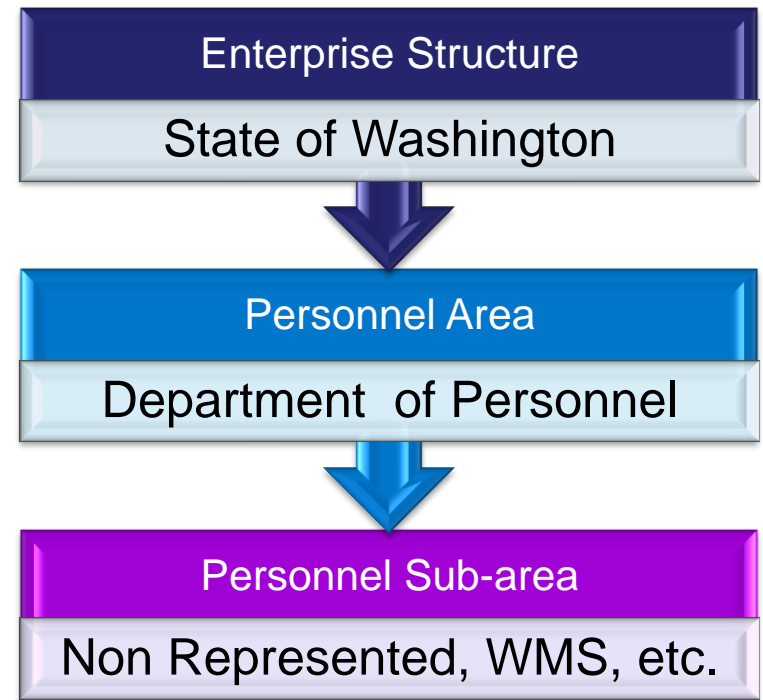
# Enterprise Structure and Personnel Structure

- DOP creates the \_\_\_\_\_ and \_\_\_\_\_.
- These two structures must be set up to create the Organizational Structure.



# Enterprise Structure

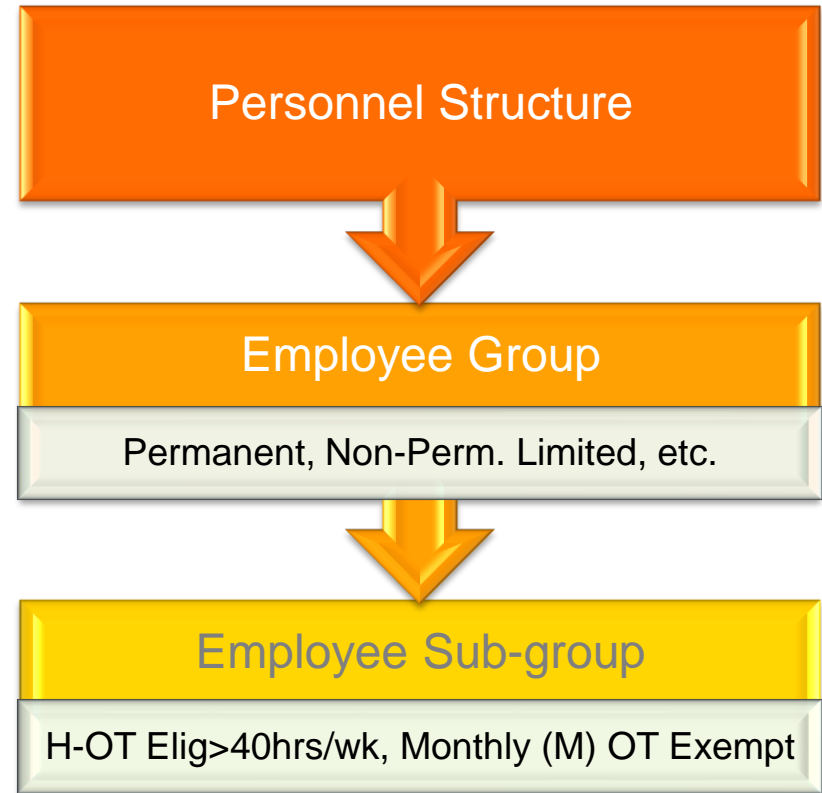
- The Enterprise Structure consists of the Personnel Area and Personnel Sub-Area.
  - Personnel Area is:
    - a specific agency/sub-agency in the State of Washington.
  - Personnel Sub-Area:
    - identifies Bargaining Units, WMS, Exempt and Non-represented positions.





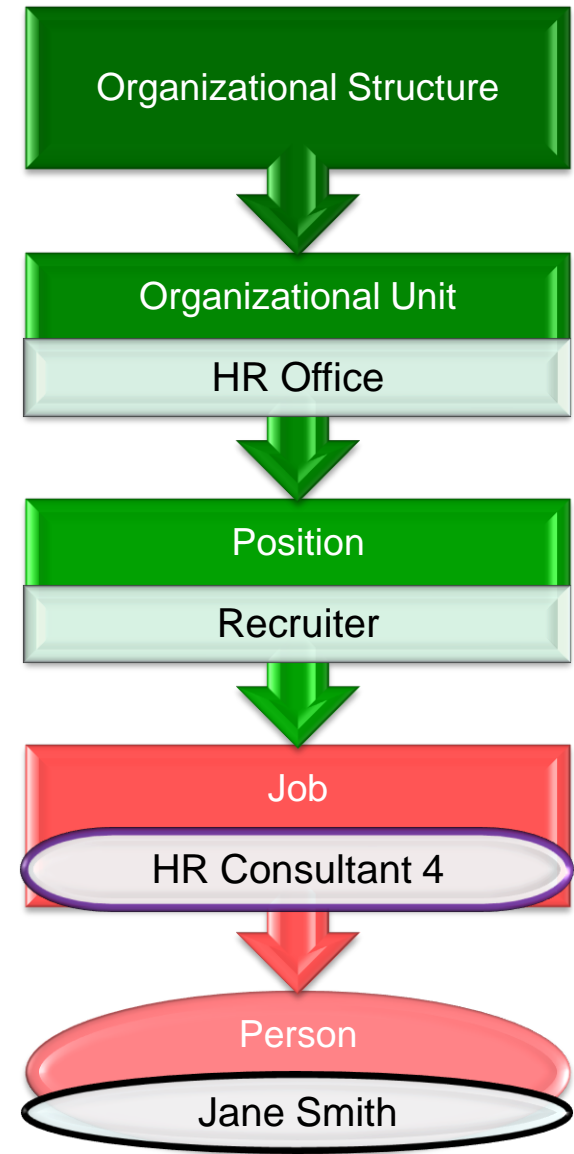
# Personnel Structure

- The Personnel Structure consist of the Employee Group and Employee Sub-Group.
  - Employee Group is:
    - status of an employee or position within the State of Washington.
  - Employee Sub-Group is:
    - a sub-division of Employee Group which defines work period designation and salary rate unit.

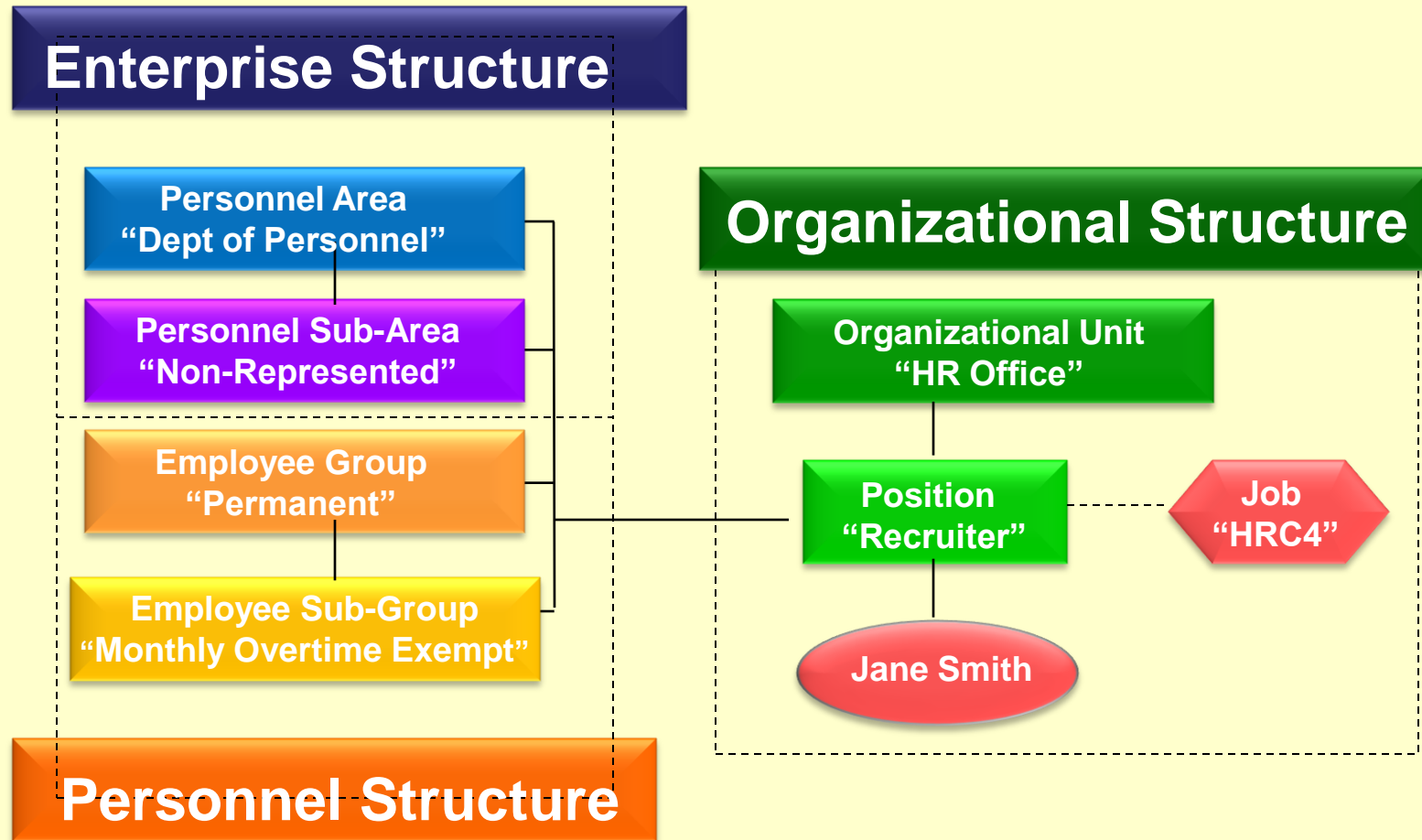


# Organizational Structure

- Organizational Structure is made up of Organizational Units, Positions, Jobs, People, and Cost Centers.
  - Organizational Unit:
    - represents the departments, regions, divisions, units etc. within an Agency.
  - Job is:
    - generic in nature; contains attributes used to create specific positions when drafting an organizational plan.
  - Position is:
    - a specific and concrete description of the responsibilities that one individual fulfills in an organization.



# HRMS Structure Overview



# HRMS Structure Overview – cont'd

Infotype Edit Goto Extras System Help

Display Organizational Assignment (0001)

Org Structure

Enterprise Structure

Personnel Structure

Organizational Structure

Personnel No. 21000001 Name Ann Pickler

PersArea 1500 General Administration EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 08/18/2007 to 12/31/9999 Chng 08/13/2007 00235846

Enterprise structure

CoCode WA01 STATE OF WASHINGTON

Pers.area 1500 General Administration Subarea 0001 Non Represented

Cost Ctr 1500000000 DEFAULT AGENCY... Bus. Area 1500 Dept of General Administr...

Fund

Personnel structure

EE group 0 Permanent Payr.area 11 Semi-monthly

EE subgroup 06 M-OT Elig>40hrs/wk Contract Permanent

Organizational plan

Percentage 100.00

Position 70009629 1367 OFF ASST 2

Job key 50000271 1001 OFF ASST 2

Exempt N

Org. Unit 30001371 E&A Engineering & Archite...

Org.key 41

Administrator

PersAdmin

Time 041 ENG & ARCH SVCS

PayrAdmin

# Organizational Management Concepts

## ■ Objects

- An individual element of information which exists in HRMS

**Example:**

## ■ Relationships

- This describes how two objects are linked together, such as a reporting relationship

**Example:**

## ■ Characteristics/Attributes

- Information that defines the org unit, position or job

**Example:**

# Organizational Objects

1. Organizational Management is based on organizational objects.
2. Each object is designated a letter in HRMS:
  - **S** \_\_\_\_\_
  - **P** \_\_\_\_\_
  - **O** \_\_\_\_\_
  - **C** \_\_\_\_\_
  - **K** \_\_\_\_\_

# Organizational Objects

- Position (**S**) – A group of duties and responsibilities to be performed by an employee. An object related specification tied to an Organizational Unit.
- Person (**P**) – An individual in an organization.
- Organizational Unit (**O**) - Represents the departments, regions, divisions, units etc. within an Agency
  - Relationships between organizational units are used to determine the hierarchy within the organizational structure.



# Organizational Objects

- Job (**C**) - General task of similar purpose and knowledge requirements. Also referenced as the job classification.
  - Jobs can be related to positions and during hiring exceptions to people.
    - Exceptions include In-training and Under-fills.
- Cost Center (**K**) - An object in HRMS that represents a defined location of cost incurrence.





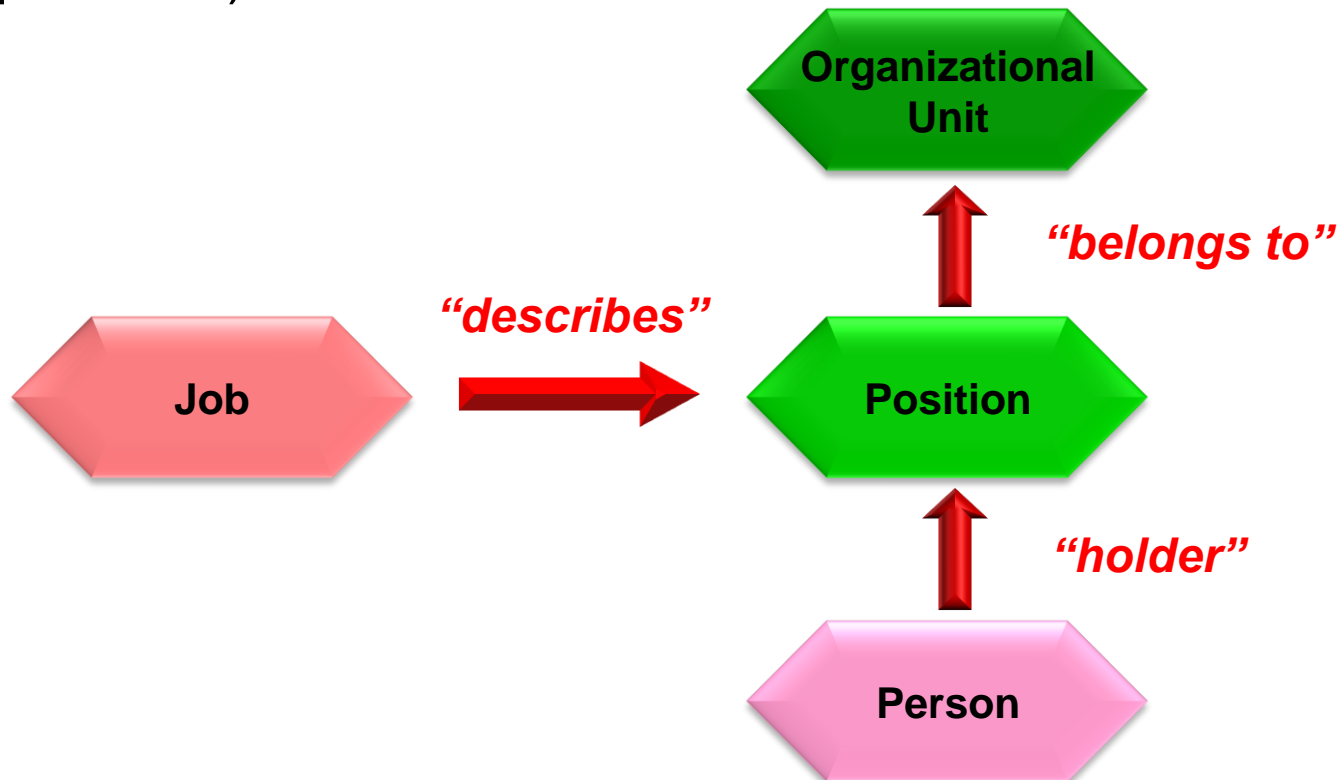
# Organizational Relationships

- Relationships are created when organizational objects are linked together
- These relationships represent the organizational structure
  - Agency Organizational Processors create and maintain their organizational structure

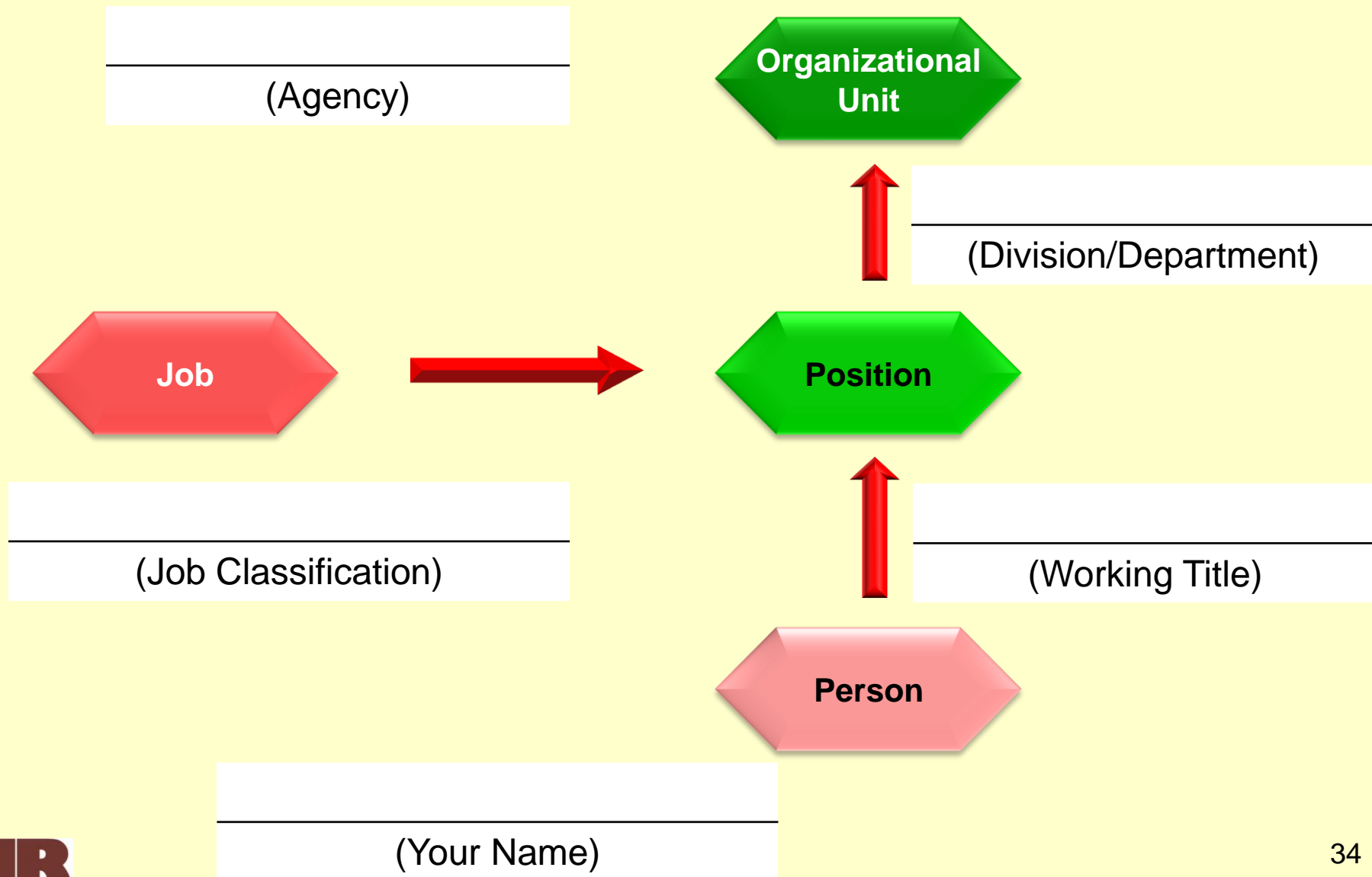


# Organizational Structure - Relationships

- Organizational Structure is a representation of the reporting structure in an agency.
  - Made up of multiple organizational objects and their hierarchical relationships (e.g. organizational units, jobs, positions).



# Organizational Structure



# Characteristics/Attributes

- Organizational objects have additional information that defines the organizational unit, position or job.
  - *Planned Compensation* (1005)
    - Provides detail information on compensation for the linked job and position.
  - *Cost Distribution* (1018)
    - Displays the assigned cost center for the related position.
  - *Account Assignment* (1008)
    - Assigns the Personnel Area and the Personnel Sub-area.

**Customer Service  
Specialist 2**

- Range 35



**Receptionist (7009999)**

- Range 35

# Review Questions

1. True or False: Agencies create Enterprise and Personnel Structures.
2. \_\_\_\_\_ are created when organizational objects are linked together.
3. Match the Organizational Objects to their term:

S	Job
P	Person
O	Cost Center
C	Organizational Unit
K	Position

# **Section 2:**

# **Organizational Units**

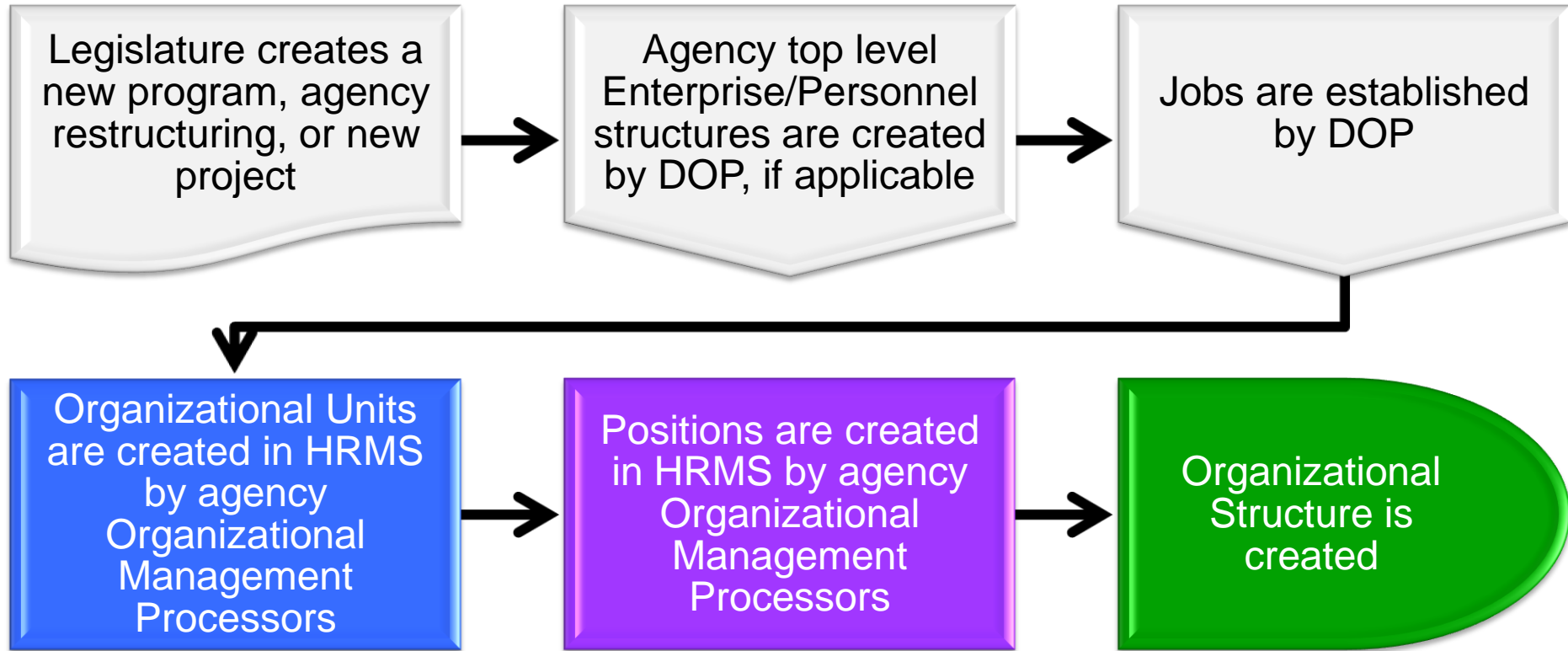
# Organizational Units Overview

Upon completion of this section you will be able to:

- Describe the relationships that are created for an organizational unit
- Perform the following exercises:
  - Create Organizational Unit
  - Maintain Organizational Unit to Organizational Unit Relationship
  - Delimit Organizational Unit



# Organizational Management Overall Process Flow



## Legend



Centralized by  
Legislature



Centralized by  
Dept. of Personnel



Decentralized by  
State Agencies



Shared  
Duty

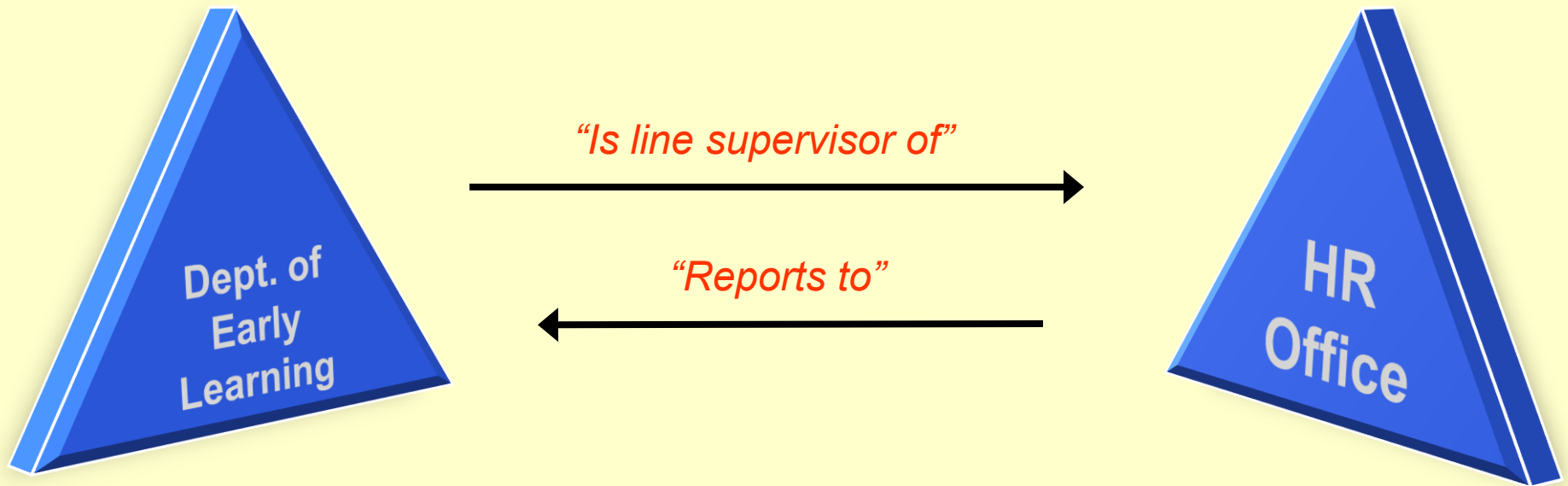


# Organizational Relationships

- Organizational relationships establish the organizational structure or hierarchy:
  - Security is based on organizational structure
  - Many reports allow reporting by organizational structure
- You establish organizational relationships during the Create Organizational Unit Action (**PP03**).
- Two types of relationships are established when creating an organizational unit:
  - Organizational unit to organizational unit
  - Organizational unit to Cost center

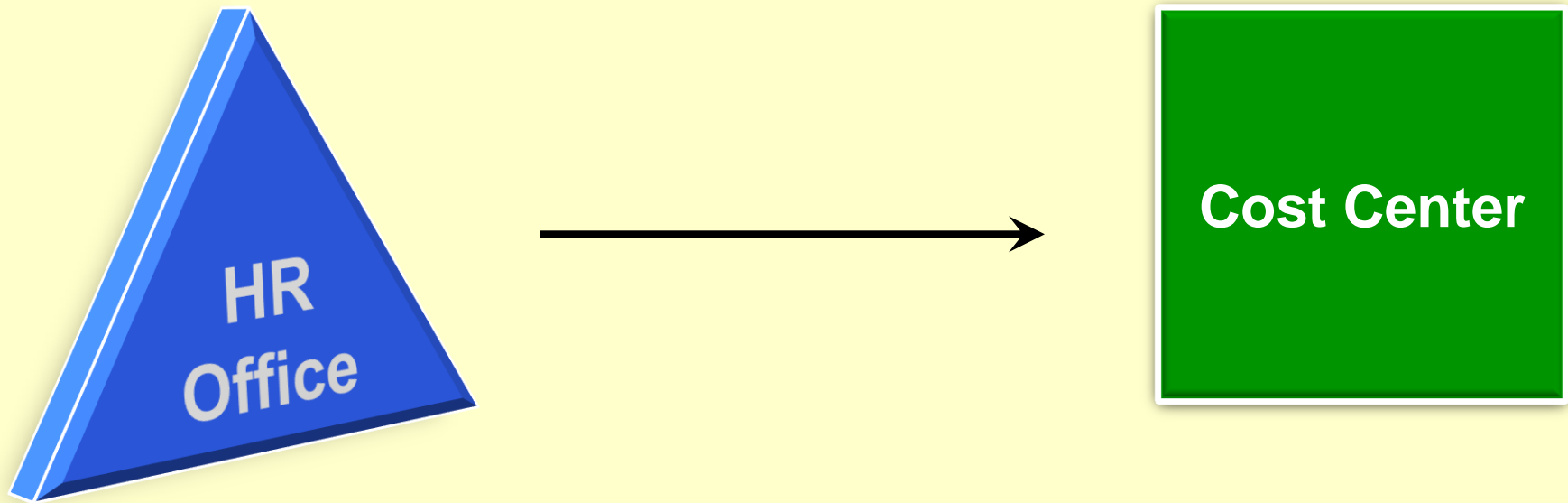
# Organizational Unit to Organizational Unit Relationship

- An organizational unit “reports to” or “is line supervisor” of another organizational unit.
- This creates the organizational hierarchy.



# Organizational Unit to Cost Center Relationship

- Every organizational unit must be “assigned” to a Cost Center to define the Business Area and Controlling Area.
  - The Cost Center represents a defined location of cost incurrence.

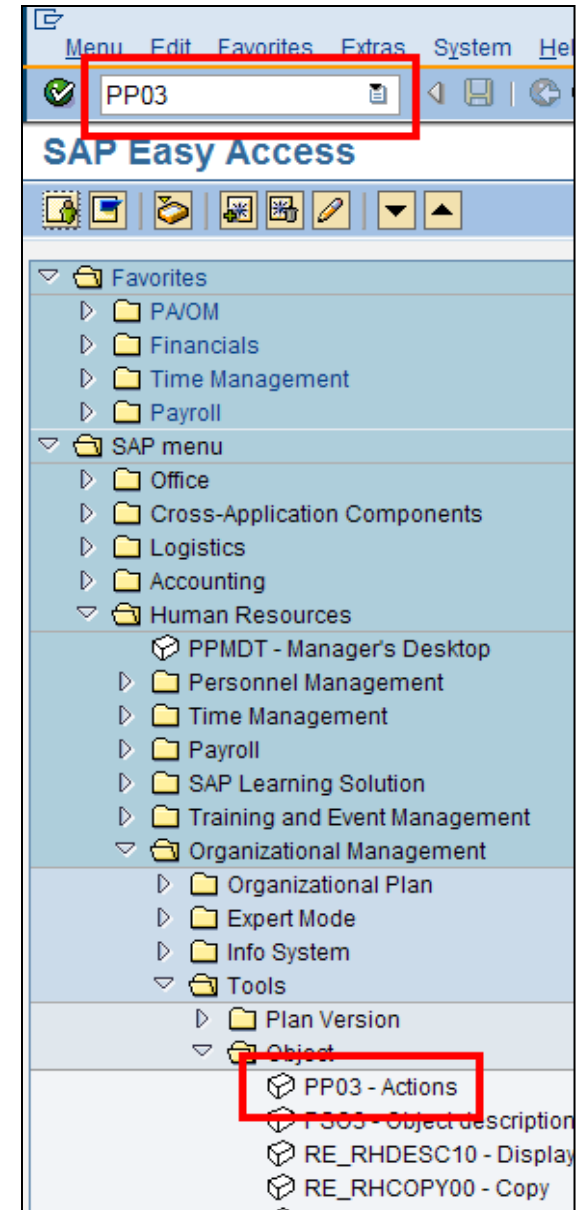


## Section 2a: Create Organizational Unit


- Create the following infotypes during the Create Organizational Unit action (PP03) :
  - Object
  - Relationship
    - To reporting Organizational Unit
    - To assigned Cost Center
  - Description
  - Relationship to Department/Staff

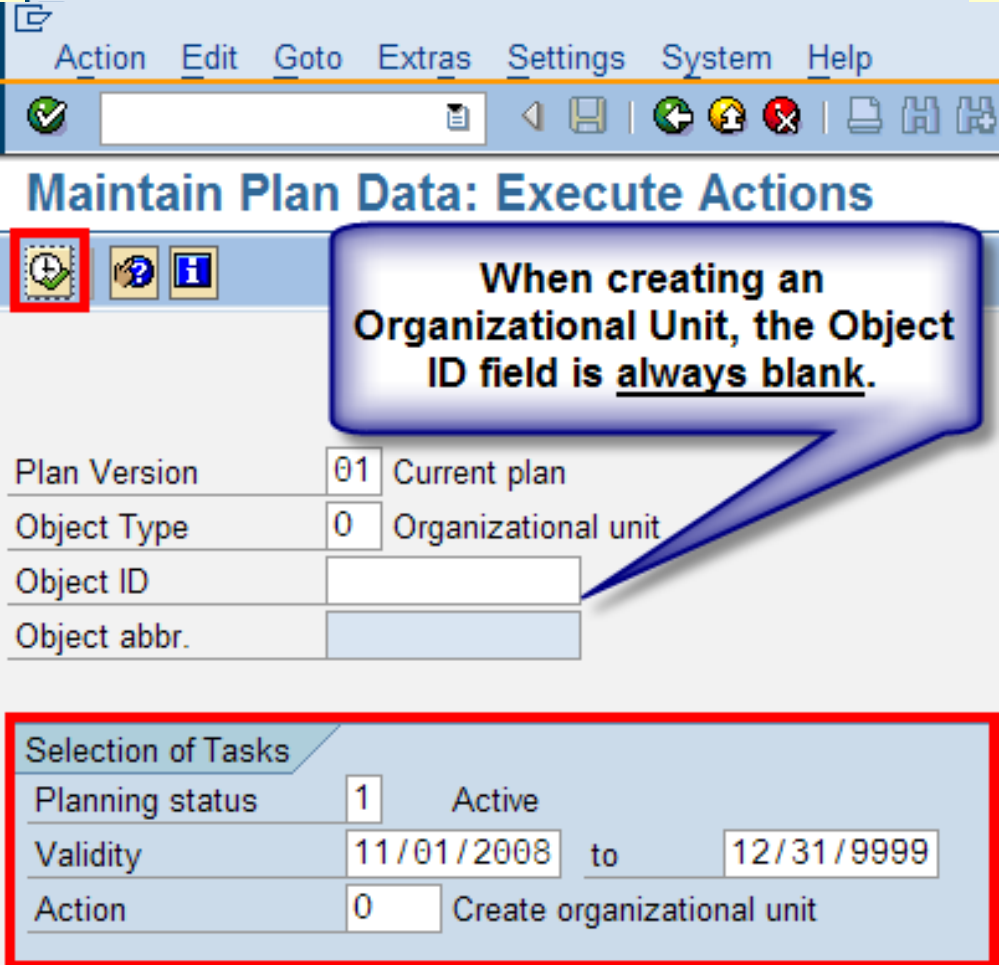
# Create Organizational Unit Action

1. To create an organizational unit use the Create Organizational Unit Action:
  - Follow Human Resources → Organizational Management → Tools → Object → Actions
  - Or use transaction code **PP03** in the **Command** field
- Using this action guides you through all required infotypes



# Maintain Plan Data: Execute Actions

- The Maintain Plan Data: Execute Actions records the effective date
2. Fields to complete:
    - **Object type**
      - O (Org Unit)
    - **Validity** (Effective date)
    - **Action**
      - O (Create organizational unit)
  3. Click  (**Execute**) to execute the action



**Maintain Plan Data: Execute Actions**

Plan Version: 01 Current plan

Object Type: 0 Organizational unit

Object ID:

Object abbr.:

**Selection of Tasks**

Planning status: 1 Active

Validity: 11/01/2008 to 12/31/9999

Action: 0 Create organizational unit

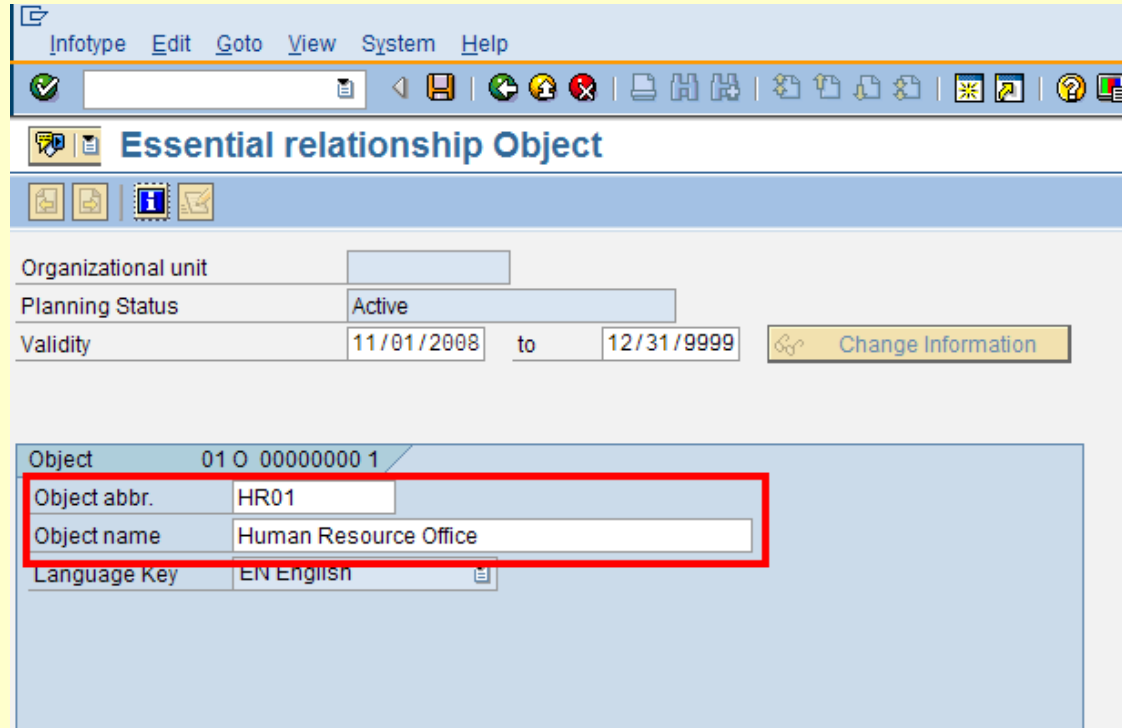
# Essential Relationship Object

- The Essential relationship Object identifies the name of the organizational unit and creates the Object ID


## 4. Fields to Complete:

- **Object abbr.**  
(short text)
- **Object name**  
(long text)

- ## 5. Click (**Enter**) to validate and then (**Save**) to save



Organizational unit	
Planning Status	Active
Validity	11/01/2008 to 12/31/9999





Object	01 O 00000000 1
Object abbr.	HR01
Object name	Human Resource Office
Language Key	EN English

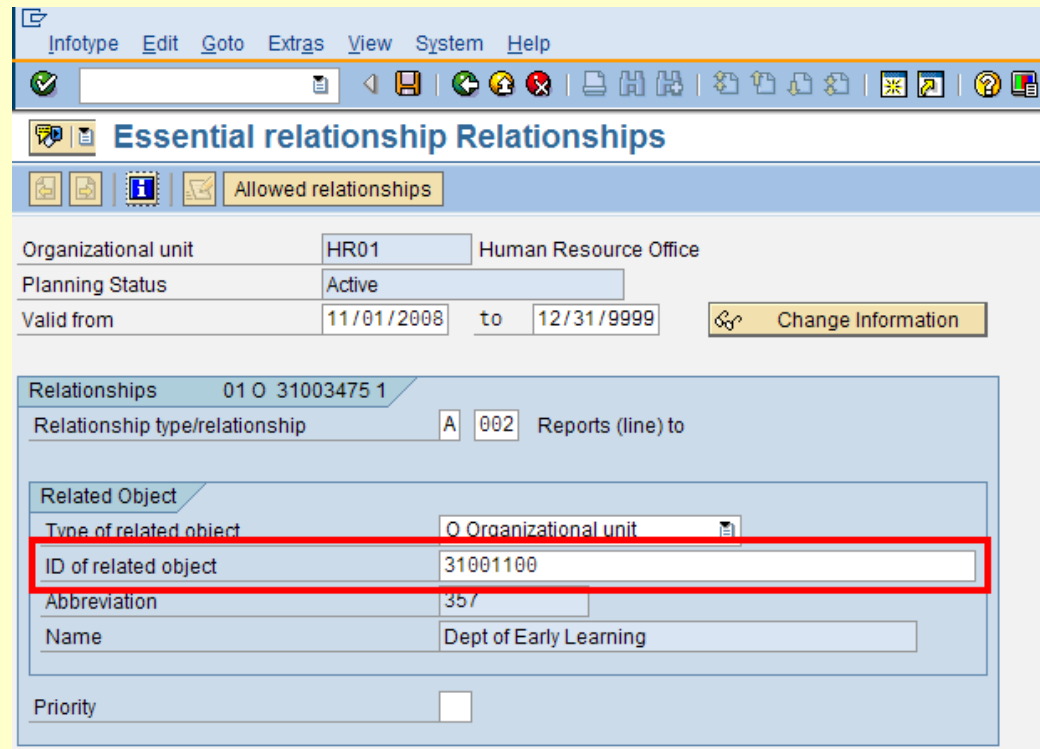
# Essential Relationship Relationships

- The Essential relationship Relationships creates a link between:
  - *The organizational unit being created and the organizational unit it will be reporting to*

6. Fields to complete:

- **ID of related object**  
(use matchcode)

7. Click  (**Enter**) to validate and  (**Save**) to save




Infotype Edit Goto Extras View System Help

**Essential relationship Relationships**

Allowed relationships

Organizational unit: HR01 Human Resource Office

Planning Status: Active

Valid from: 11/01/2008 to 12/31/9999  Change Information

Relationships 01 O 31003475 1

Relationship type/relationship: A 002 Reports (line) to

**Related Object**

Type of related object: O Organizational unit

**ID of related object: 31001100**



Abbreviation: 357

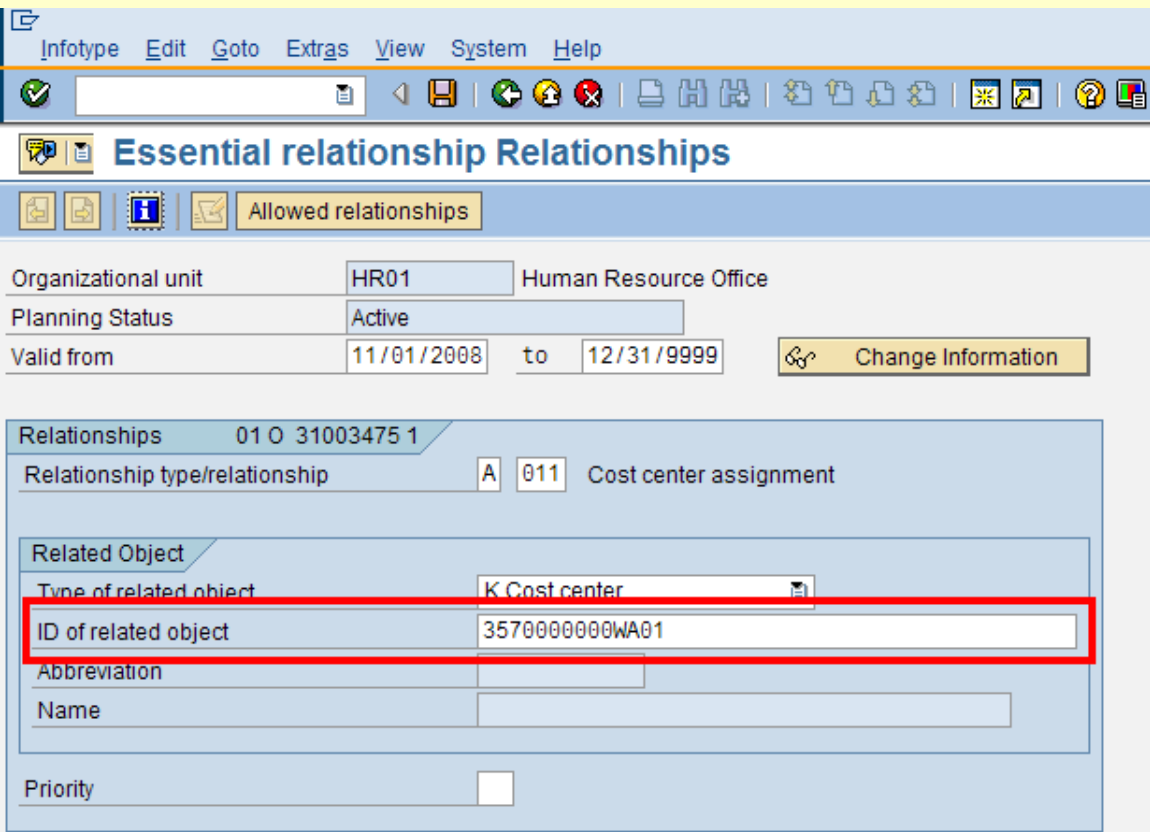
Name: Dept of Early Learning

Priority: ☐




# Essential Relationship Relationships

- The Essential relationship Relationships infotype creates a link between the following:
  - *The organizational unit (O) and the cost center (K).*
- 8. Fields to complete:
  - **ID of related object** (use matchcode)
- 9. Click  (**Enter**) to validate and  (**Save**) to save



The screenshot shows the SAP 'Essential relationship Relationships' form. The 'Organizational unit' is 'HR01' (Human Resource Office) and the 'Planning Status' is 'Active'. The 'Valid from' date is '11/01/2008' and the 'Valid to' date is '12/31/9999'. A 'Change Information' button is visible. The 'Relationships' section shows '01 O 31003475 1' and 'Relationship type/relationship' as 'A 011 Cost center assignment'. The 'Related Object' section is highlighted with a red box, showing 'Type of related object' as 'K Cost center' and 'ID of related object' as '3570000000WA01'. Other fields like 'Abbreviation', 'Name', and 'Priority' are also present.

# Essential Relationship Relationships

- Information defaults values from the previous infotype.
  - **Do not enter any information on this infotype.**
10. Click  (**Save**) to save and move to the next infotype.



Infotype Edit Goto Extras View System Help

 Essential relationship Relationships

Organizational unit HR01 Human Resource Office

Planning Status Active

Validity 11/01/2008 to 12/31/9999

Key fields for cost center

Cost Center 3570000000 DEFAULT AGENCY 357



CO Area WA01 Washington State

# Create Description

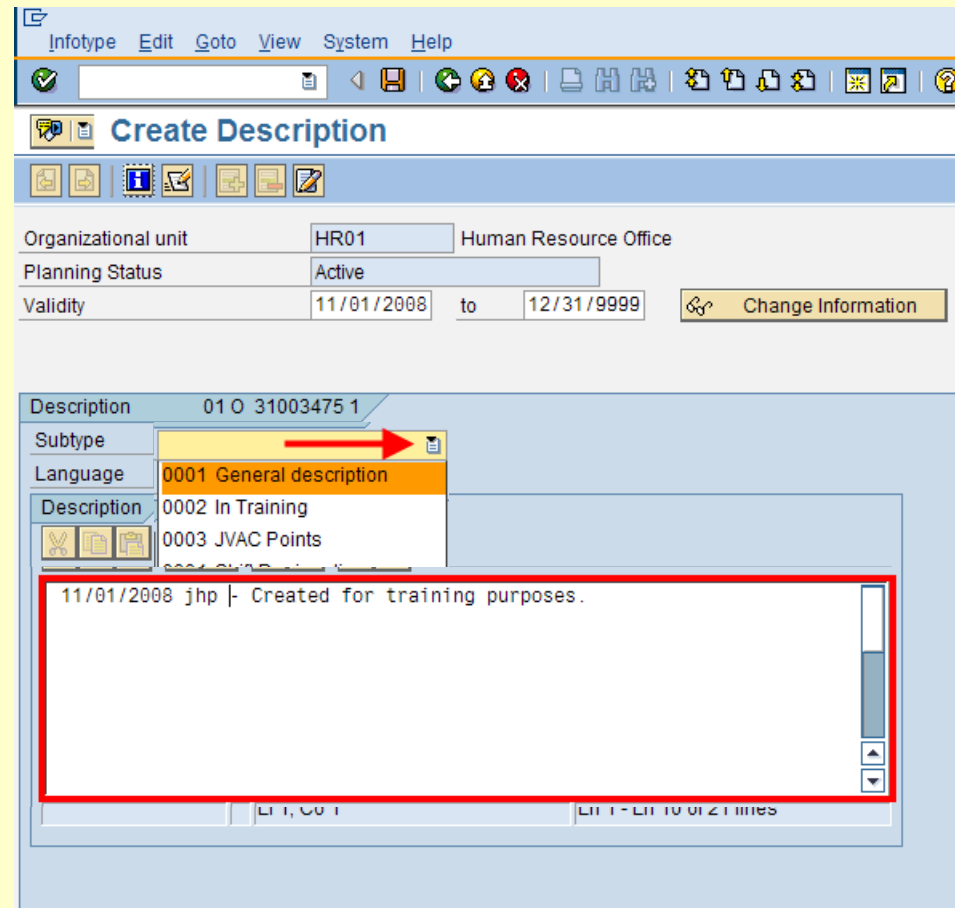
- The Create Description infotype provides the option to enter a general description of the organizational unit

11. Fields to complete:

- **Subtype**
- **Text description**

12. Click  (**Enter**) to validate and  (**Save**) to save

**Note:** This infotype can be skipped by clicking  (**Cancel**).



# Create Department/Staff

- The Essential relationship *Department/Staff* infotype displays the created organizational unit in the Organizational Structure.

Infotype Edit Goto View System Help

Essential relationship Department/Staff

Organizational unit: HR01 Human Resource Office

Planning Status: Active

Valid from: 11/01/2008 to 12/31/9999 Change Information

Department/Staff 01 O 31003475 1

☐ Staff

☒ Department

13. Fields to complete:

– **Department**

14. Click  (**Enter**) and then click  (**Save**) to save

# Maintain Plan Data: Execute Actions

- After saving the Department/Staff infotype, you will be taken back to the beginning of the Maintain Plan Data: Execute Actions.
- The HRMS Object ID number for the Organizational Unit you created will be in the Object ID field.

**Maintain Plan Data: Execute Actions**

Find by

- ☐ Organizational unit
- ☐ Search Term
- ☐ Structure Search

Plan Version: 01 Current plan

Object Type: 0 Organizational unit

Object ID: 31003475 Human Resource Office

Object abbr.: HR01

**Selection of Tasks**

Planning status: 1 Active

Validity: 11/01/2008 to 12/31/9999

Action: 0 Create organizational unit

# **HRMS Activity**



**Create Organizational Unit  
Walk-through**

# Review Questions

1. What is the designated letter for the object type of Organizational Unit?

---

---

2. Which relationships are set up when creating an organizational unit?

---

---

## 2b: Maintain Organizational Unit

- Data created in HRMS is both current and historical.
- Infotypes enable HRMS to maintain information on all employees, as well as historical records.
- Based on the assigned role and agency, certain information is available to each user.
  - For example, an Organizational Management Processor in Washington State Patrol has access to their agency's organizational structure. While an Organizational Management Processor in Department of Fish and Wildlife has access to the same information, but for their agency only.



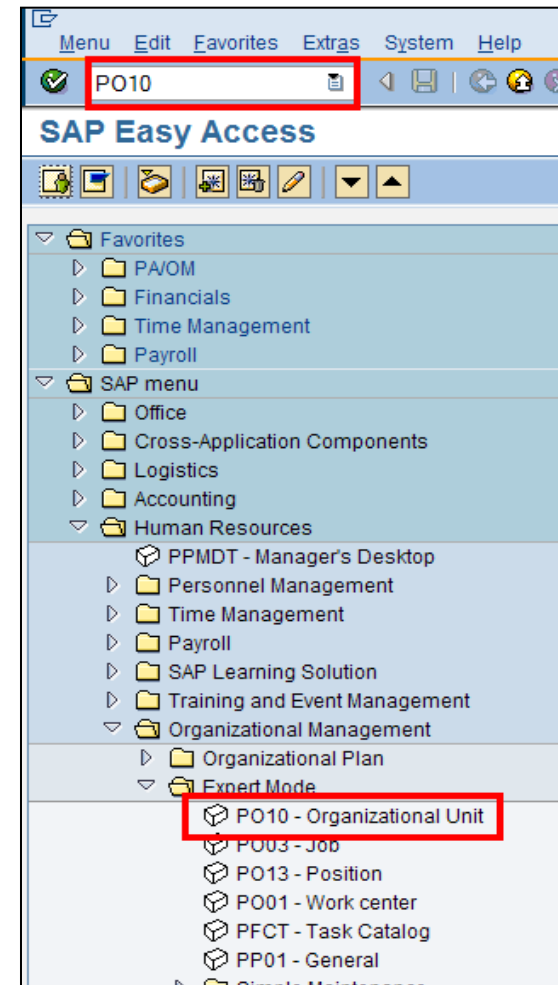


# Maintain Organizational Unit – cont'd



- Reasons for maintaining organizational units include:
  - Moving an organizational unit as a result of a reorganization
  - Splitting one organizational unit into two organizational units
  - Combining two organizational units into one
  - Renaming an organizational unit, changing a description, or updating any other infotype record associated with the organizational unit

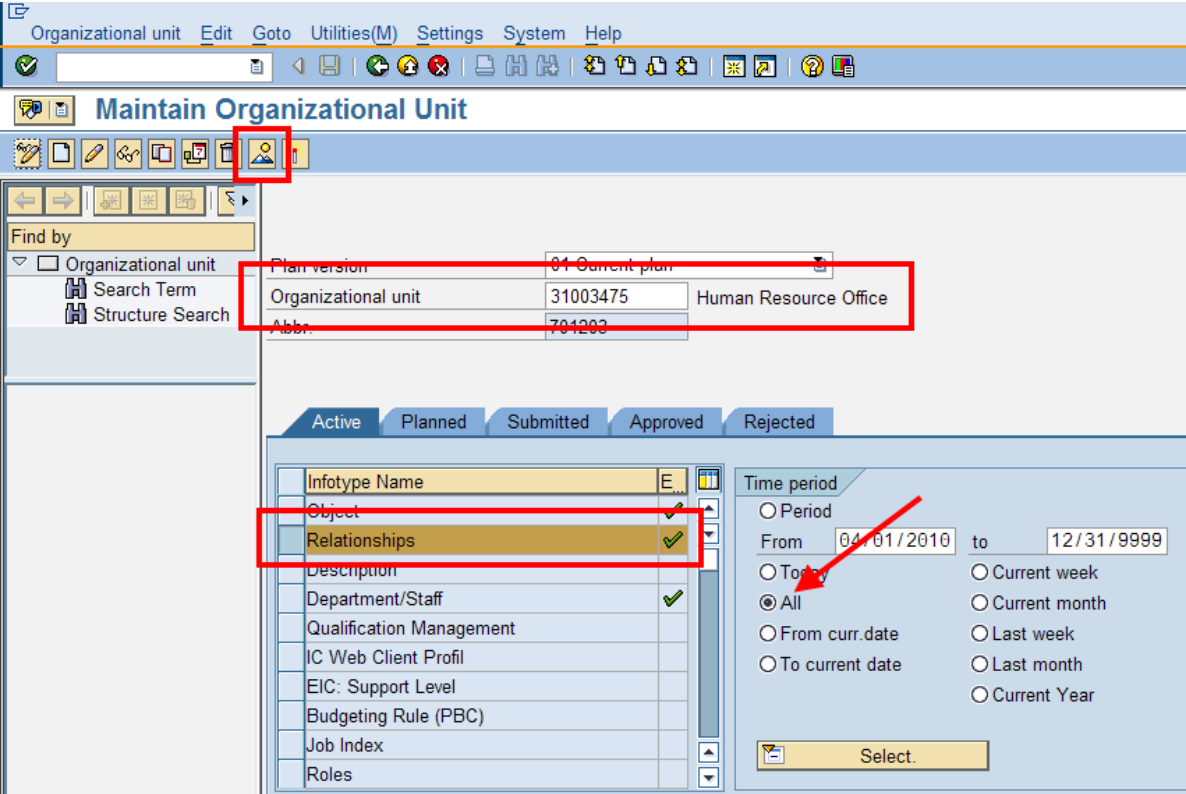
# Maintain Organizational Unit action

1. To maintain an organizational unit use the Maintain Organizational Unit:
  - Follow Human Resources → Organizational Management → Expert Mode → Organizational unit
  - Or use transaction code **PO10** in the **Command** field



# Maintain Relationships

2. Enter the Organizational Unit Object ID and click  (Enter) to validate
3. Click the gray box to the left of **Relationships** to select
4. Click the radio button 'All'
5. Click  (Overview) for an overview of all actions associated with *Relationships* (1001)



Organizational unit Edit Goto Utilities(M) Settings System Help

**Maintain Organizational Unit**

Find by  
Organizational unit  
Search Term  
Structure Search

Plan version: 01 Current plan  
Organizational unit: 31003475 Human Resource Office  
Addr: 701203


Active Planned Submitted Approved Rejected

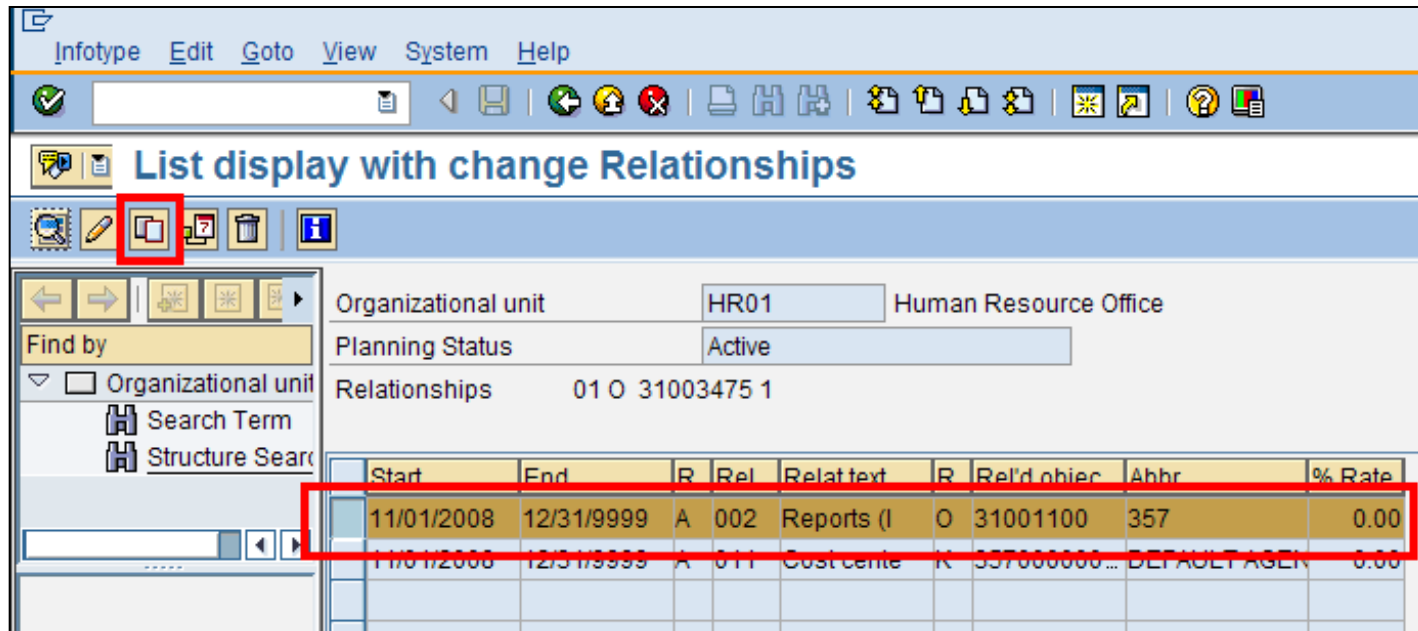
Infotype Name E...  
Object  
Relationships  
Description  
Department/Staff  
Qualification Management  
IC Web Client Profil  
EIC: Support Level  
Budgeting Rule (PBC)  
Job Index  
Roles

Time period  
Period  
From: 04/01/2010 to: 12/31/9999  
Today  
All  
From curr.date  
To current date  
Current week  
Current month  
Last week  
Last month  
Current Year  
Select.

**Note:** The additional infotypes displayed are not being used by the State of Washington. See the Additional Information section to remove from view.

# Maintain Relationships

5. Click the gray box to left of the appropriate record
6. Click  (**Copy**) to copy and continue



Infotype Edit Goto View System Help

List display with change Relationships

Organizational unit: HR01 Human Resource Office




Planning Status: Active

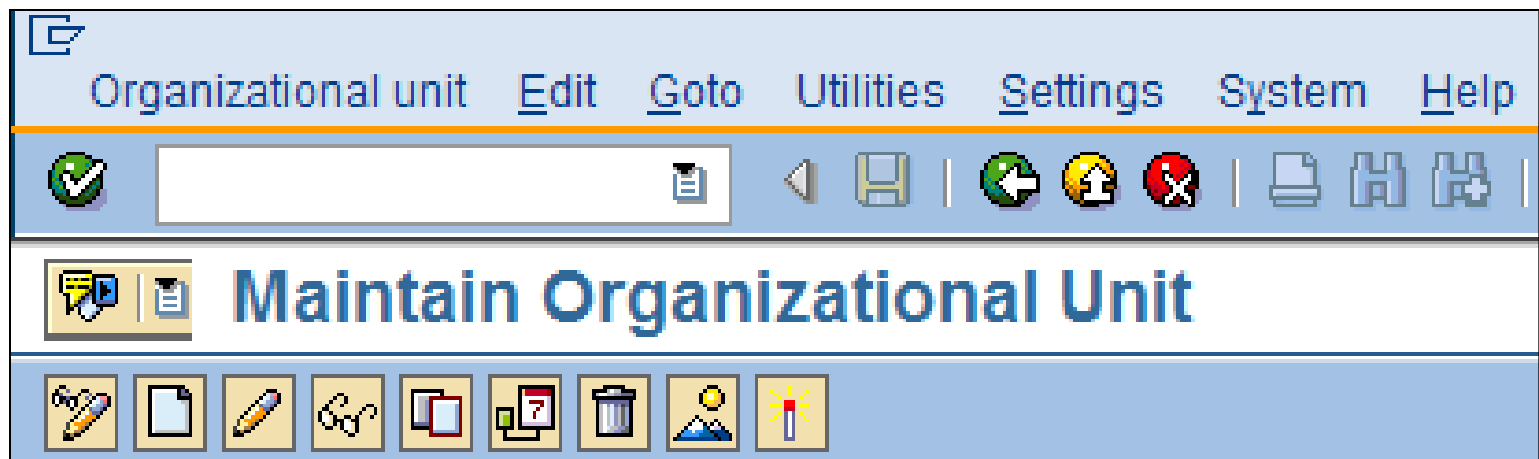
Relationships: 01 O 31003475 1

Start	End	R	Rel	Relat text	R	Rel'd object	Abbr	% Rate
11/01/2008	12/31/9999	A	002	Reports (I	O	31001100	357	0.00
11/01/2008	12/31/9999	A	011	Cost center	K	3370000000...	DEFAULT AGER	0.00

# Maintain Function Keys

Choosing the appropriate function key is important:

- Click  (**Create**) to create a new record
- To update the infotype and record the history, click  (**Copy**)
  - The new start date of the record will be used for the current information. This will end date the existing record and reduces data entry.
- To change/correct the infotype with no history, click  (**Change**)



# Maintain Relationships

Infotype Edit Goto Extras View System Help

**Copy Relationships**

Find by

- Organizational unit
- Search Term
- Structure Search

Organizational unit: HR01 Human Resource Office

Planning Status: Active

Valid from: 11/01/2008 to 12/31/9999

Change Information

Relationships 01 O 31003475 1

Relationship type/relationship: A 002 Reports (line) to

Related Object

Type of related object: O Organizational unit

ID of related object: 31001100

Abbreviation: 357



Name: Dept of Early Learning

Priority:

Record 1 of 2

8. Fields to complete:

- **Valid from** (effective dates)
- **ID of related object** (use matchcode)

9. Click  (**Enter**) to validate and click  (**Save**) to save

# **HRMS Activity**



**Maintain Organizational Unit  
Exercise**

# Section 2c: Delimit Organizational Unit

- You automatically delimit individual infotype records when you create and save a copy of an infotype record.
- You can also delimit the entire organizational unit when its no longer needed due to a reorganization and for other business reasons.
  - This will delimit the organizational unit's attributes and relationships and keep a history of the organizational unit.



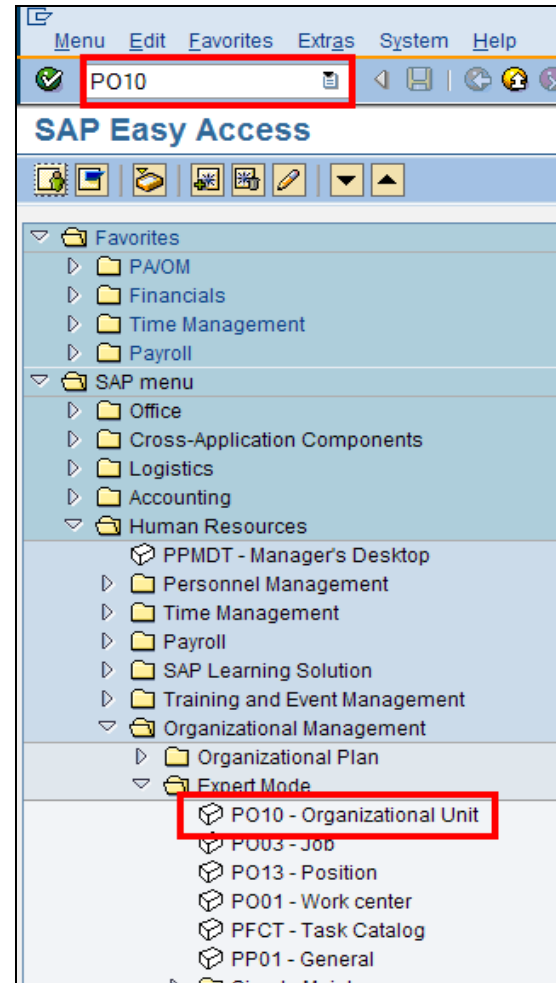
# Delimit Organizational Unit – cont'd

- When you delimit an organizational unit, all relationships will be delimited.
  - Use Overview function to review the *Relationships* (1001) to ensure there are **no active relationships** with positions or with organizational units that report to the organizational unit you are delimiting.





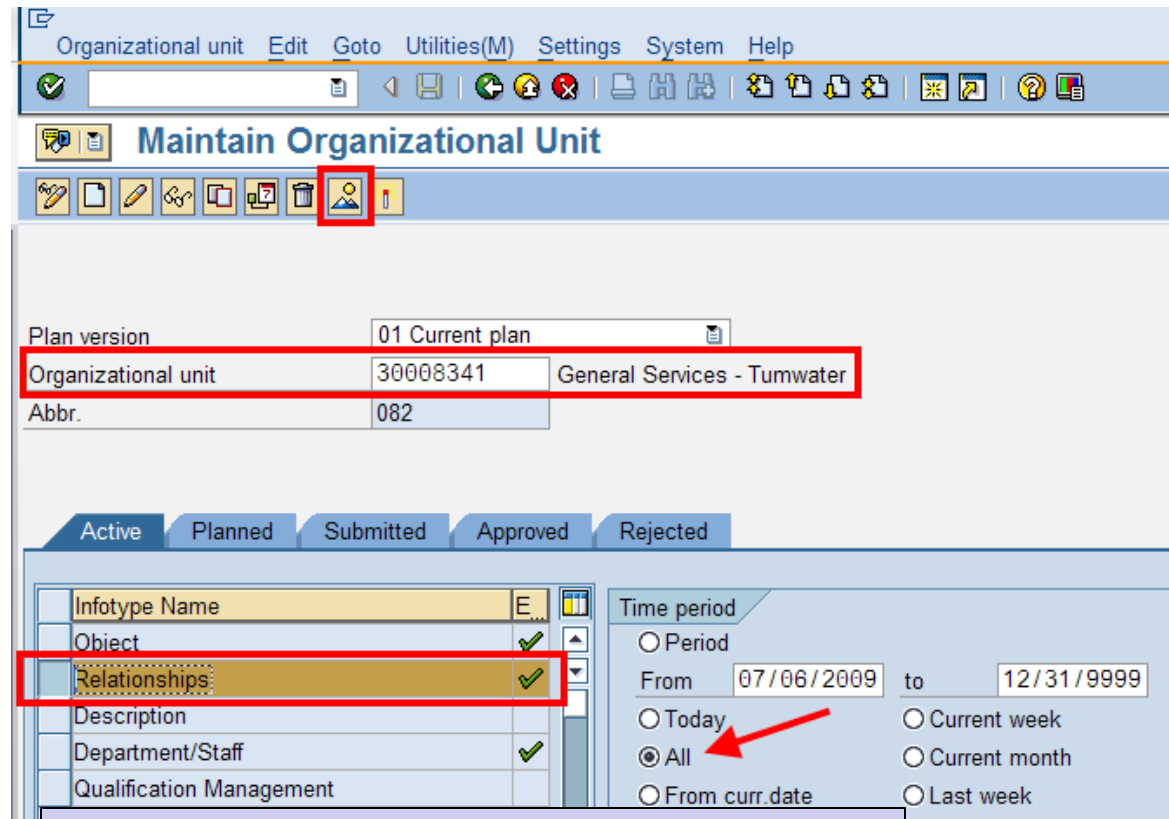
# Delimit Organizational Unit action

1. To delimit an organizational unit use the Maintain Organizational Unit action:
  - Follow Human Resources  
→ Organizational Management → Expert Mode → Organizational unit
  - Or use transaction code **PO10** in the **Command** field



# Delimit Organizational Unit

2. Enter the organizational unit number and click  (**Enter**) to validate
3. In the Time period section, click the radio button for 'All'
4. Click the gray box to the left of relationships
5. Click  (**Overview**) for an overview of all actions



Plan version 01 Current plan

Organizational unit 30008341 General Services - Tumwater

Abbr. 082

Active Planned Submitted Approved Rejected

Infotype Name	E...
Object	✓
Relationships	✓
Description	
Department/Staff	✓
Qualification Management	

Time period

☐ Period

From 07/06/2009 to 12/31/9999

☐ Today

☒ All

☐ From curr.date

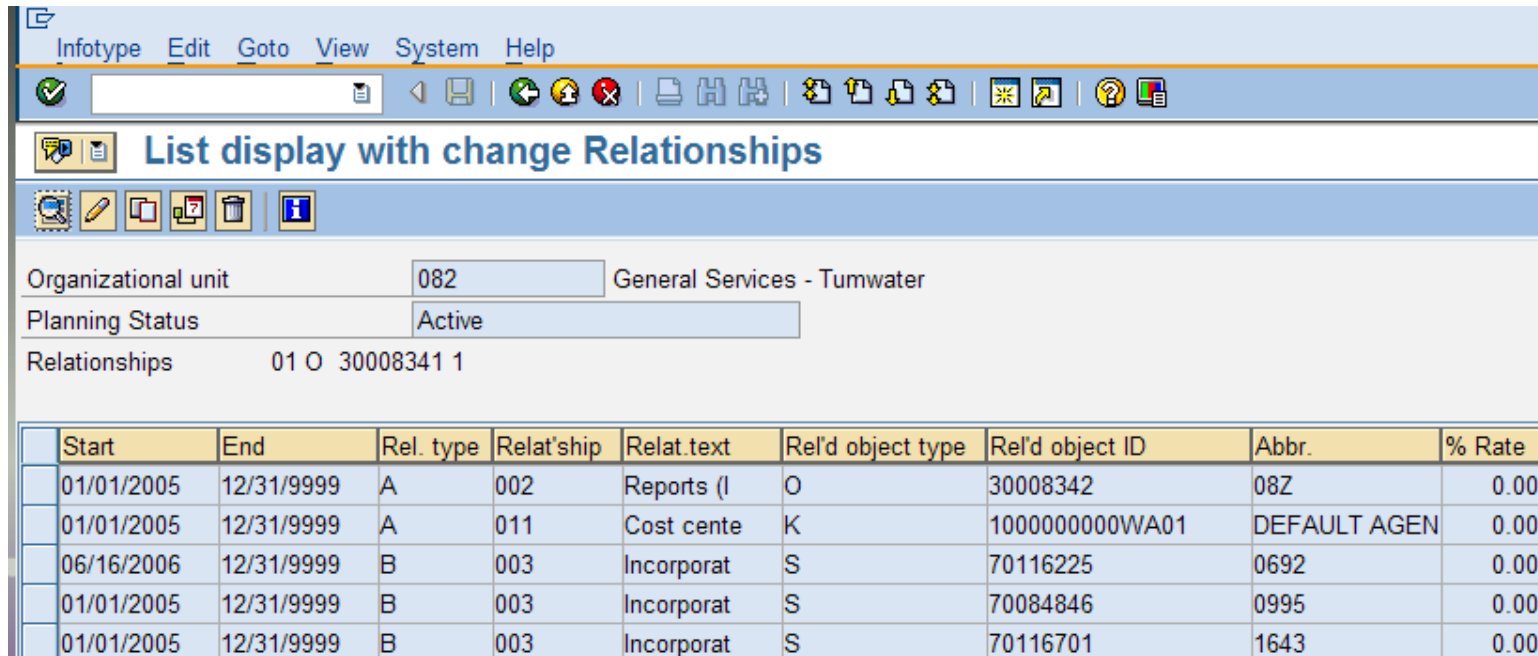
☐ Current week

☐ Current month

☐ Last week

**Note:** The additional infotypes displayed are not being used by the State of Washington. See the Additional Information section to remove from view.

# Delimit Organizational Unit



Infotype Edit Goto View System Help

List display with change Relationships

Organizational unit: 082 General Services - Tumwater

Planning Status: Active

Relationships: 01 O 30008341 1

	Start	End	Rel. type	Relat'ship	Relat.text	Rel'd object type	Rel'd object ID	Abbr.	% Rate
	01/01/2005	12/31/9999	A	002	Reports (I	O	30008342	08Z	0.00
	01/01/2005	12/31/9999	A	011	Cost cente	K	1000000000WA01	DEFAULT AGEN	0.00
	06/16/2006	12/31/9999	B	003	Incorporat	S	70116225	0692	0.00
	01/01/2005	12/31/9999	B	003	Incorporat	S	70084846	0995	0.00
	01/01/2005	12/31/9999	B	003	Incorporat	S	70116701	1643	0.00

- You can determine the type of relationships by viewing the relationship type and the relationship object type.

– Example :

- B/002 Is line supervisor of O (Organizational Unit)
- B/003 Incorporates S (Position)

# Delimit Organizational Unit

Infotype Edit Goto View System Help


List display with change Relationships

Organizational unit 082 General Services - Tumwater



Planning Status Active

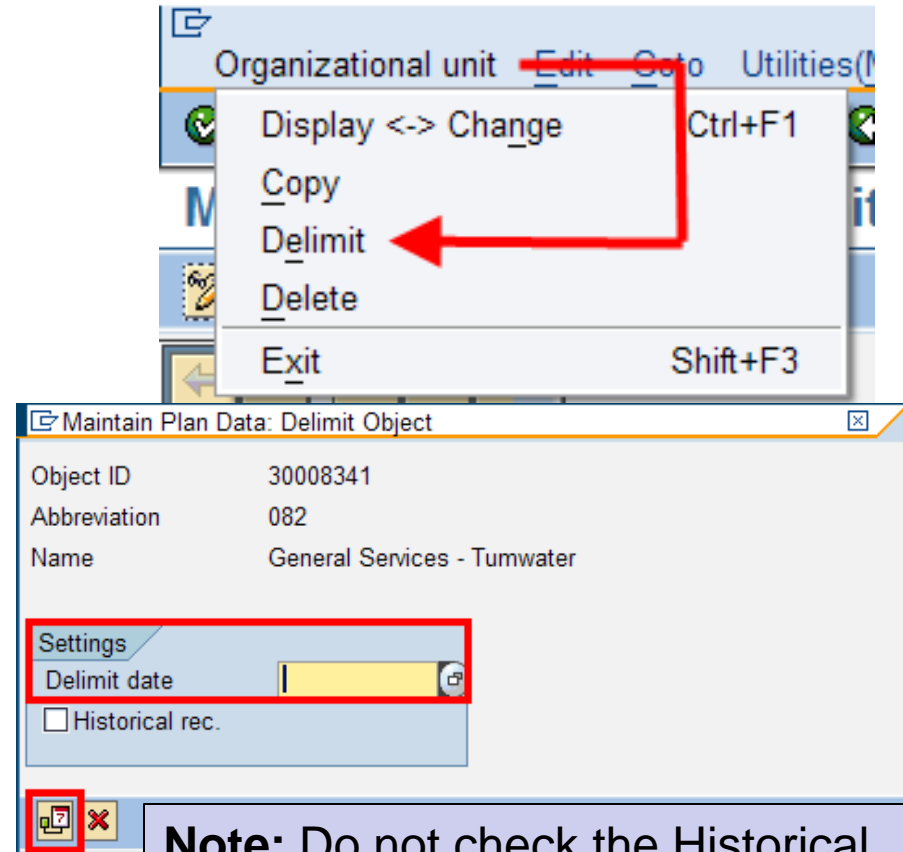
Relationships 01 O 30008341 1

Start	End	Rel. type	Relat'ship	Relat.text	Rel'd object type	Rel'd object ID	Abbr.	% Rate
01/01/2005	12/31/9999	A	002	Reports (I	O	30008342	08Z	0.00
01/01/2005	12/31/9999	A	011	Cost cente	K	1000000000WA01	DEFAULT AGEN	0.00
06/16/2006	12/31/9999	B	003	Incorporat	S	70116225	0692	0.00
01/01/2005	12/31/9999	B	003	Incorporat	S	70084846	0995	0.00
01/01/2005	12/31/9999	B	003	Incorporat	S	70116701	1643	0.00

- Active positions or organizational units that report to the organizational unit you are delimiting, will need to have a new relationship with another active organizational unit before you can proceed to delimit.
6. To return to Maintain Organizational Unit, click  (**Exit**).

# Delimit Organizational Unit

7. To delimit an organizational unit, enter the organizational unit number and click  (**Enter**) to validate
8. On the menu bar select Organizational Unit → Delimit
9. From the Maintain Plan Data: Delimit Object pop-up, enter the Delimit date
10. Click  (**Delimit object**)



**Note:** Do not check the Historical rec. box when delimiting. If checked, the record cannot be changed.

# **HRMS Activity**

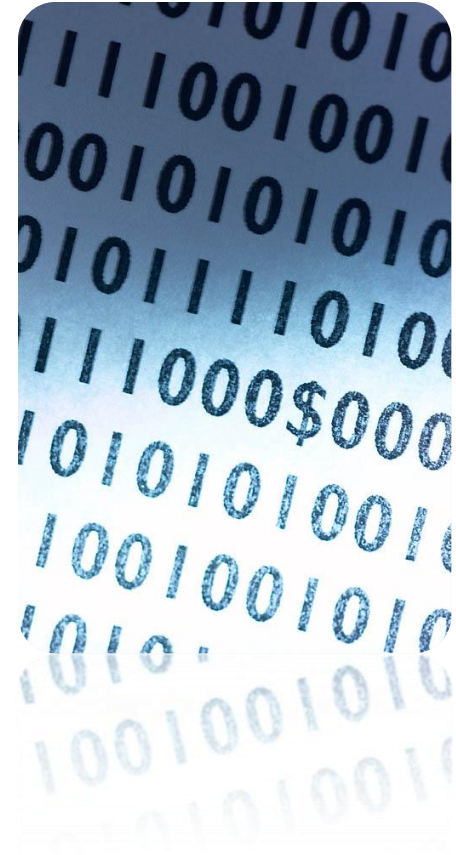


## **Delimit Organizational Unit Exercise**

# Organizational Management Transactions

## ■ Organizational Unit

- Create Organizational Unit **PP03**
- Display Organizational Unit **PO10D**
- Maintain Organizational Unit **PO10**





# What else do I need to know?



- See OLQR User Procedures:
  - Organizational Unit Action\_Create
  - Organizational Unit\_Delimit
  - Maintain Organizational Unit to Organizational Unit Relationship

**Website address:** <http://win-shrweb.dis.wa.gov/olqr/nav/index.htm>

# **Section 3: Positions**

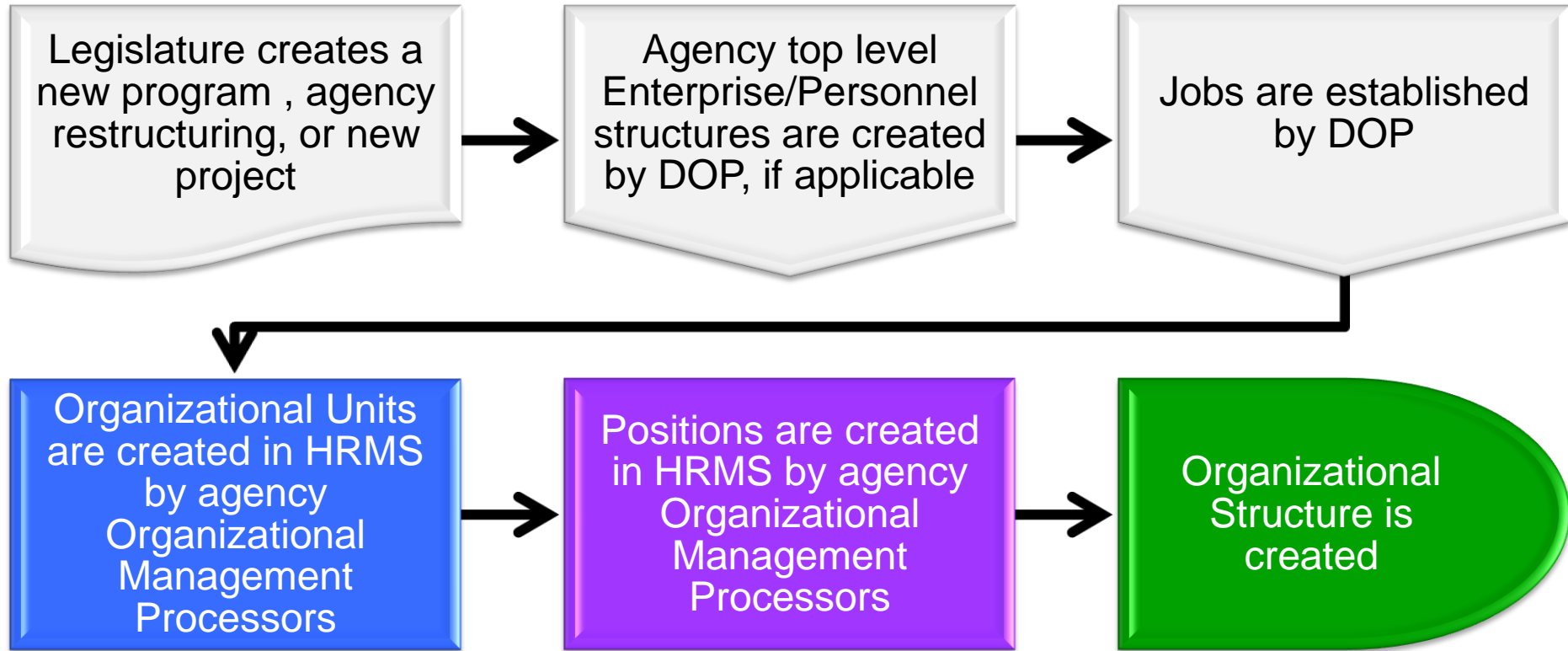
# Positions Overview

Upon completion of this section you will be able to:

- Explain the process of creating and maintaining positions
- Perform the following exercises:
  - Create a Position
  - Delimit a Position



# Organizational Management Overall Process Flow



## Legend



Centralized by  
Legislature



Centralized by  
Dept. of Personnel



Decentralized by  
State Agencies



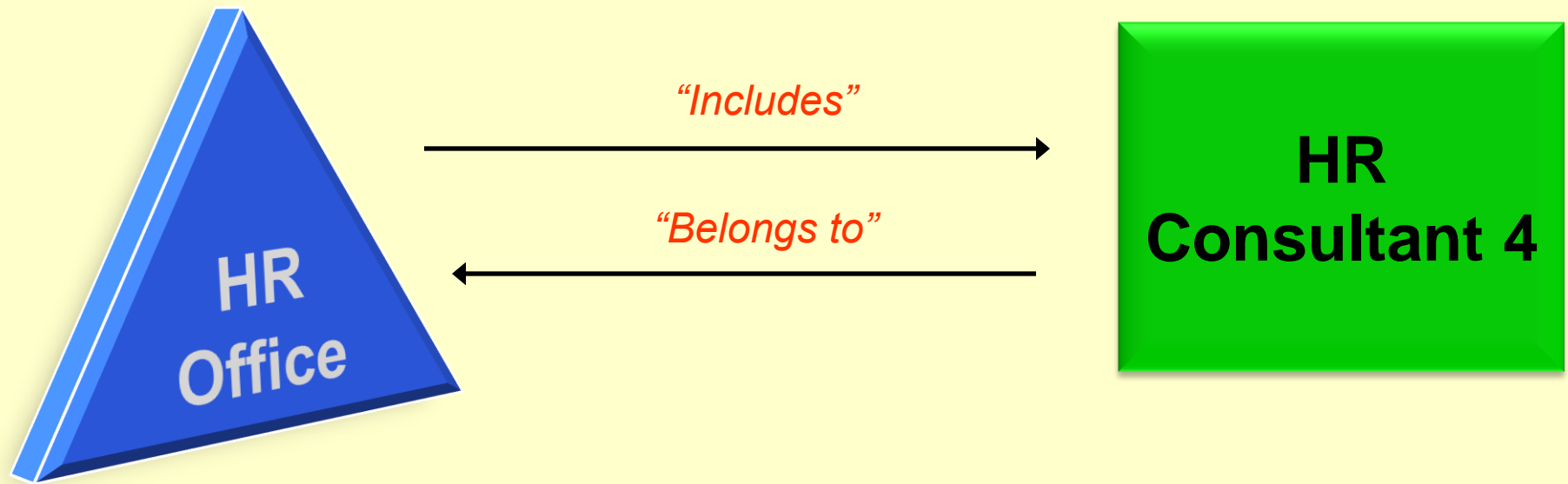
Shared  
Duty

# Position Relationships

- There are five relationships that can be established for a position.
- The following three are created in the Create Position action (**PP03**):
  - Position to organizational unit
  - Position to job
  - Position to reporting position
- The following two are established outside of the Create Position action:
  - Assignment pay
  - Dual language

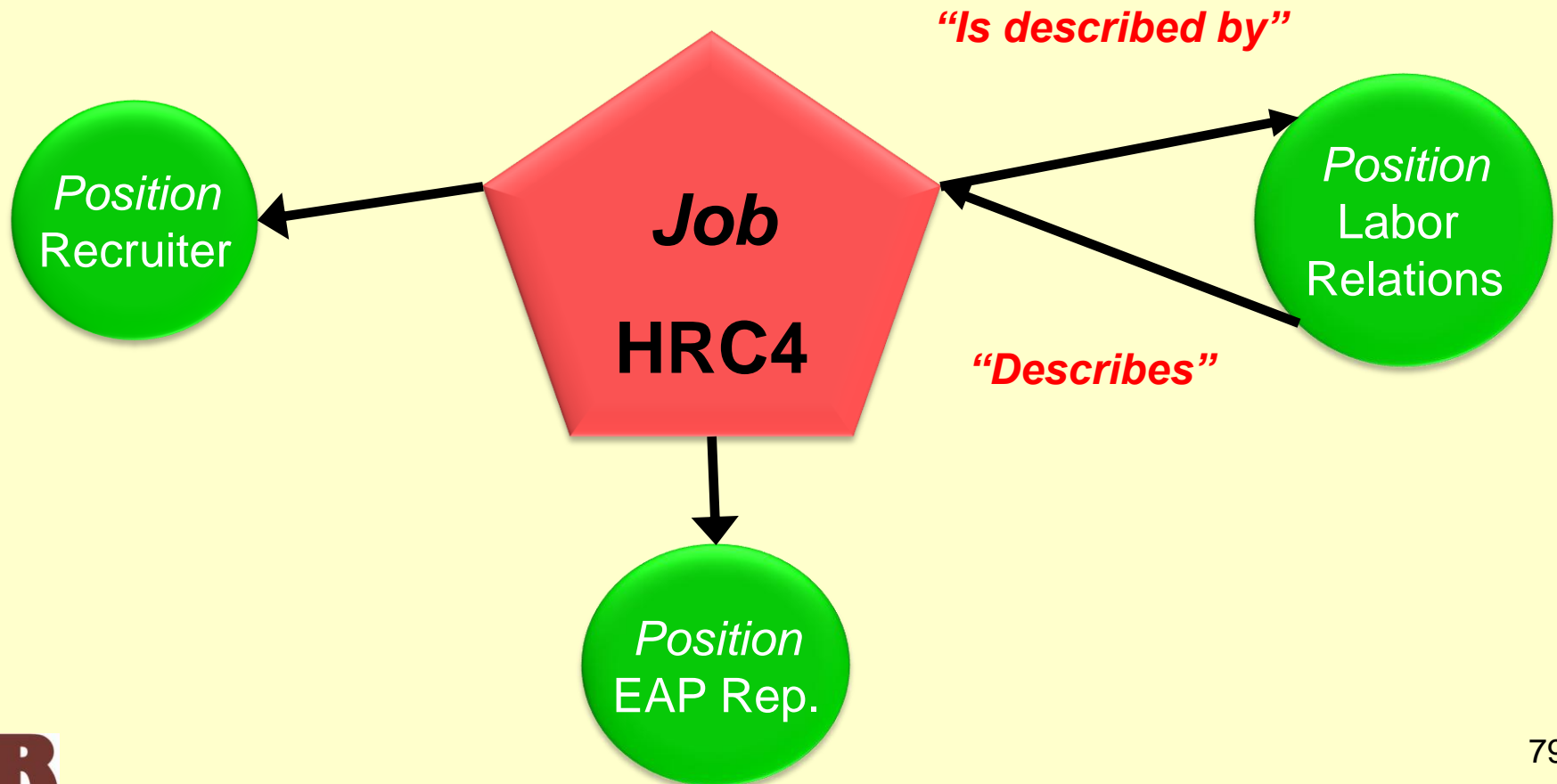
# Position to Organizational Unit Relationships

- Position to organizational unit relationships:
  - Position belongs to organizational unit
  - Organizational unit includes position



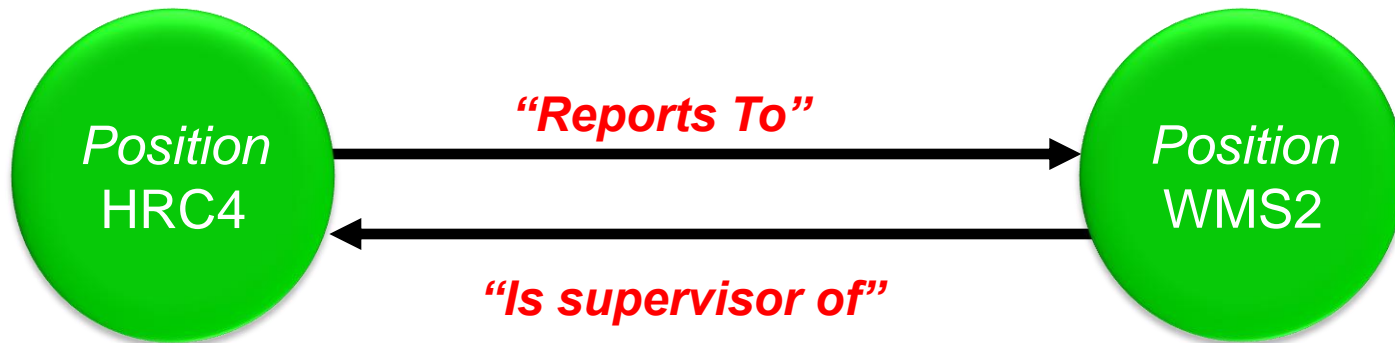
# Position to Job Relationships

- Position to job relationships:
  - Job describes a position
  - Position is described by a job



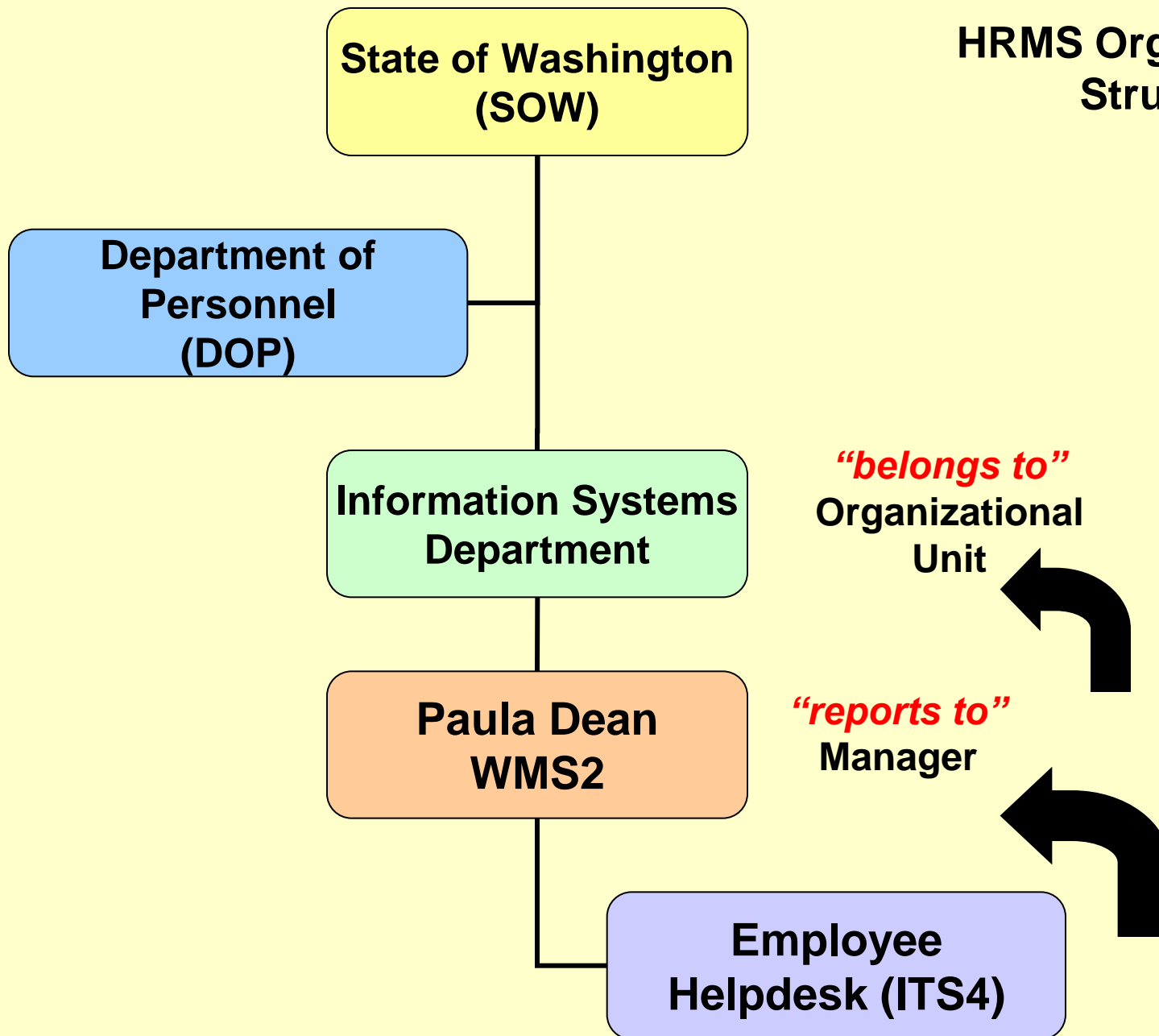
# Position to Position Relationships

- Position to position relationship:
  - Reports to/is line supervisor of
  - Defines the supervisor and subordinate





## HRMS Organizational Structure

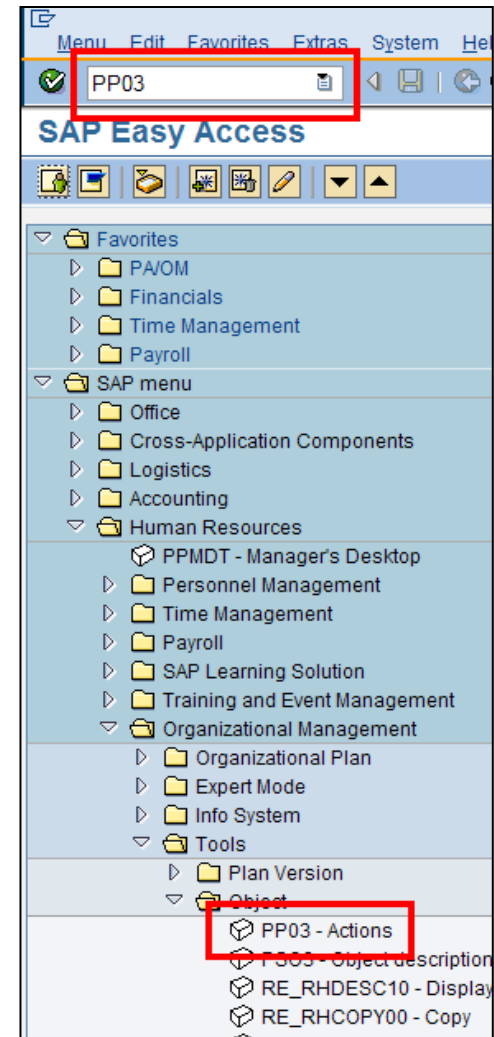


# Section 3a: Create Position Action Infotypes


- Create the following infotypes during the Create Position action including:
  - *Object* (1000)
  - *Relationship* (1001)
  - *Description* (1002)
  - *Employee Group/Sub-group* (1013)
  - *Account Assignment* (1008)
  - *Planned Compensation* (1005)
  - *Vacancy* (1007)
  - *Work Schedule* (1011)
  - *Cost Distribution* (1018)
  - *Address* (1028)
  - *Job Attributes* (1660)

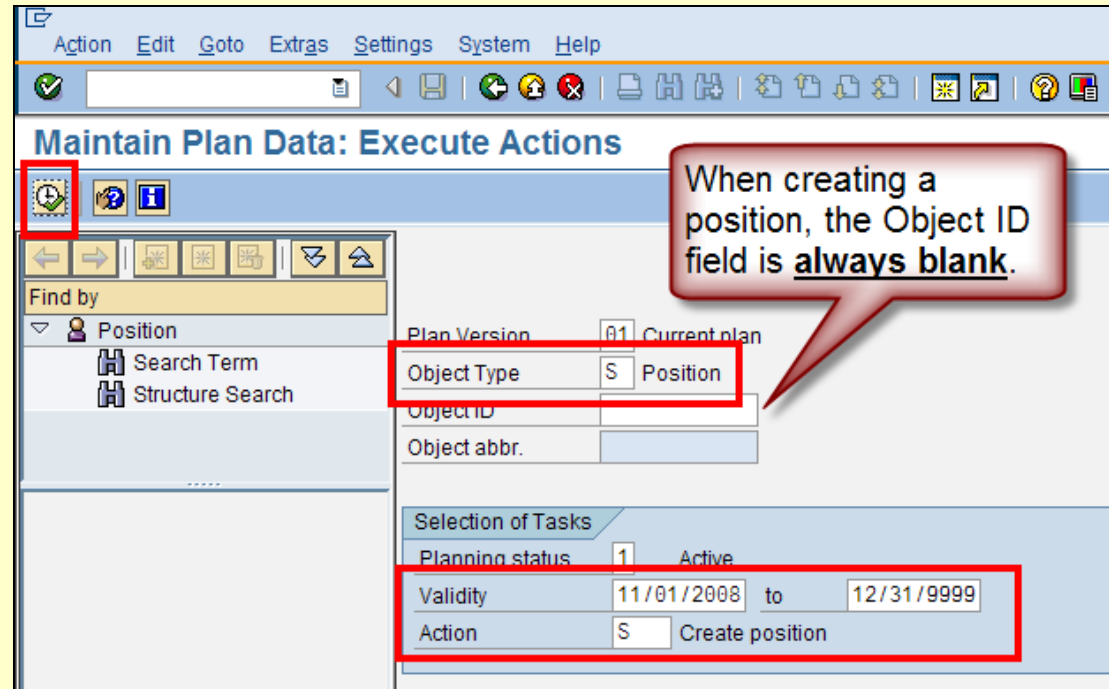
# Create Position Action

1. To create a position use the Create Position action:
  - Follow Human Resources  
→ Organizational Management → Tools → Object → Actions
  - Or use transaction code **PP03** in the **Command** field
- Using this action guides you through all required infotypes are created



# Maintain Plan Data: Execute Actions

- The Maintain Plan Data: Execute Actions records the effective date
- 2. Field to complete:
  - **Object type**
    - S (Position)
  - **Validity** (effective date)
  - **Action**
    - S (Create Position)
- 3. Click  (**Execute**) to execute the action



Maintain Plan Data: Execute Actions

Plan Version: 01 Current plan

Object Type: S Position

Object ID:

Object abbr:

Selection of Tasks

Planning status: 1 Active

Validity: 11/01/2008 to 12/31/9999

Action: S Create position

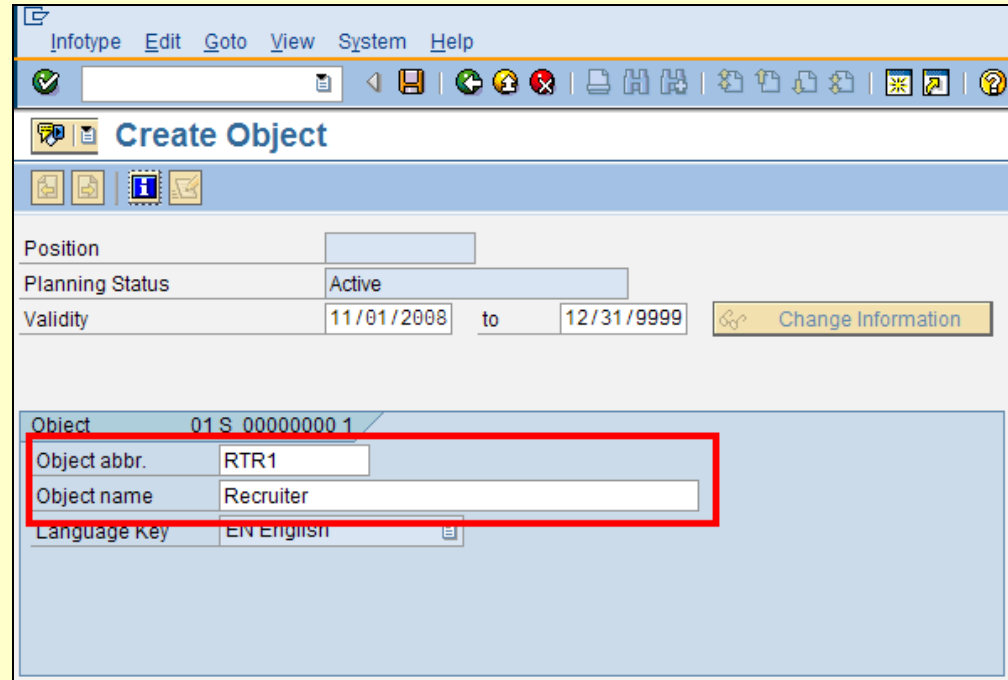
# Create Object

- The Object infotype creates the name of the position

## 4. Fields to Complete:

- Object abbreviation
- Object name

- ## 5. Click (**Enter**) to validate and click (**Save**) to save



The screenshot displays the 'Create Object' SAP infotype screen. The top menu bar includes 'Infotype', 'Edit', 'Goto', 'View', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main area is titled 'Create Object' and contains the following fields:

Position	
Planning Status	Active
Validity	11/01/2008 to 12/31/9999

A 'Change Information' button is located to the right of the validity field. Below these fields is a section for Object data, which is highlighted with a red rectangle. This section contains the following fields:

Object	01 S 00000000 1
Object abbr.	RTR1
Object name	Recruiter
Language Key	EN English



# Essential relationship Relationships

- The Essential relationship Relationships create a link between:

- *The position and organizational unit*

## 6. Fields to complete:

- **ID of related object** (use matchcode)

- ## 7.
- Click  (**Enter**) to validate and click  (**Save**) to save



# Essential relationship Relationships

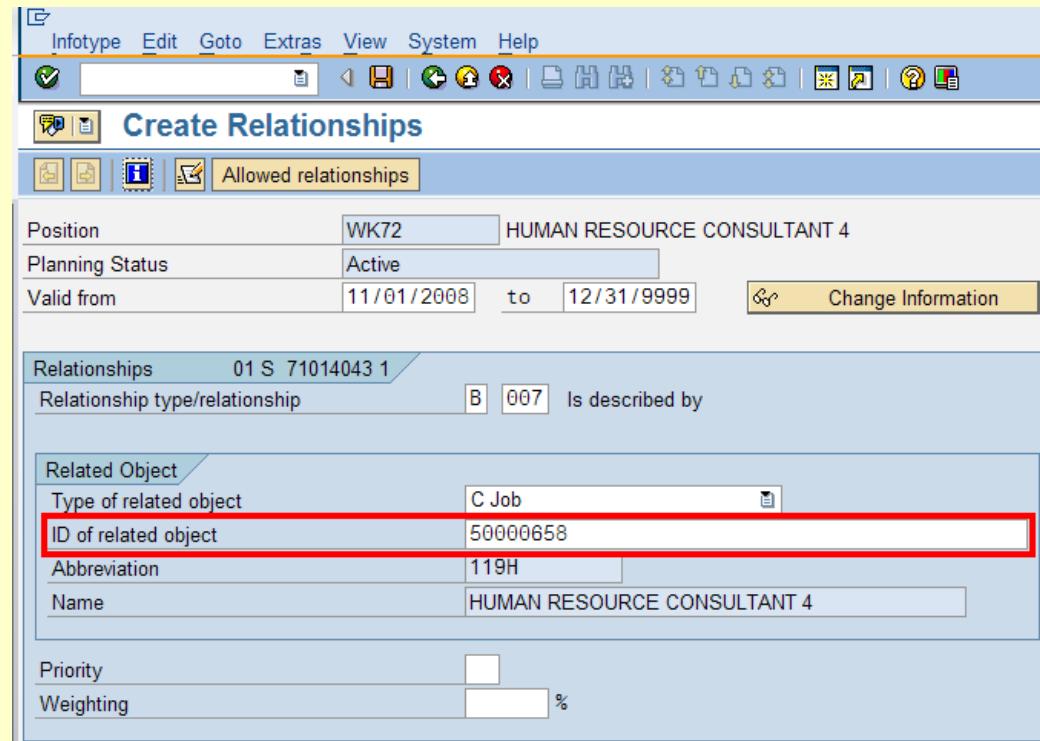
- The Essential relationship Relationships create a link between:

- *The position and the job classification*

## 8. Fields to complete:

- **ID of related object**  
(use matchcode)

9. Click  (**Enter**) to validate and click  (**Save**) to save



Infotype Edit Goto Extras View System Help

Create Relationships

Allowed relationships

Position WK72 HUMAN RESOURCE CONSULTANT 4

Planning Status Active

Valid from 11/01/2008 to 12/31/9999 Change Information

Relationships 01 S 71014043 1

Relationship type/relationship B 007 Is described by

Related Object

Type of related object C Job

ID of related object 50000658

Abbreviation 119H

Name HUMAN RESOURCE CONSULTANT 4

Priority

Weighting %



# Create Relationships

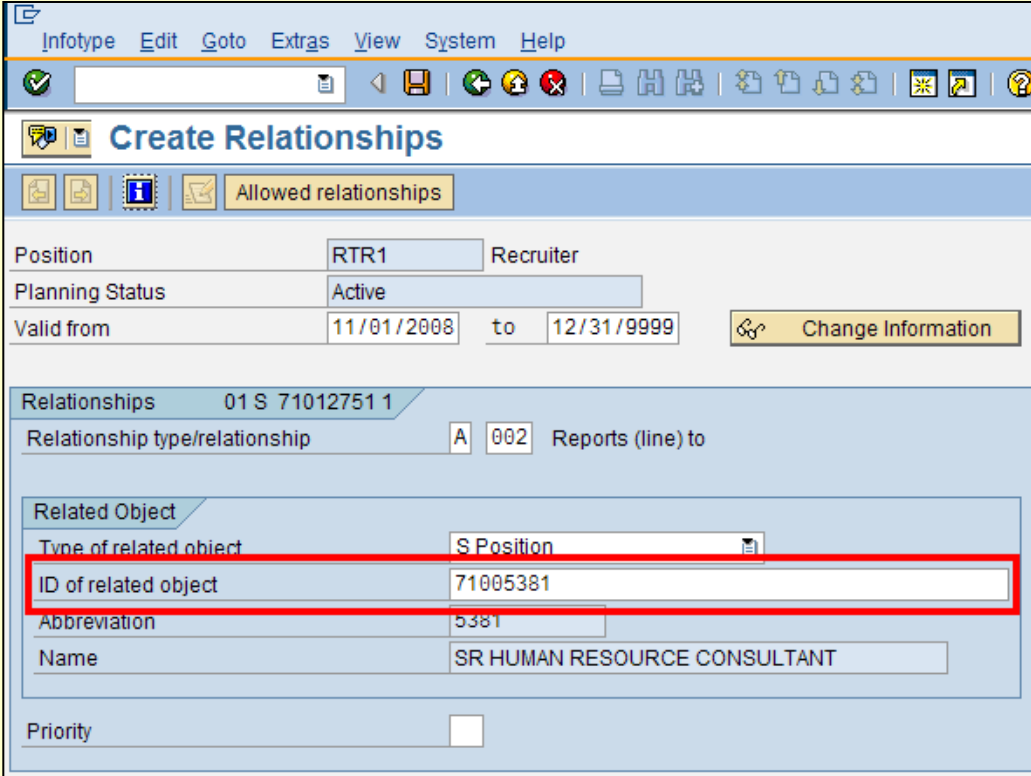
- The Essential relationship Relationships create a link between:

- *The position and the supervising position*

10. Fields to complete:

- **ID of related object** (use matchcode)

11. Click  (**Enter**) to validate and click  (**Save**) to save



Infotype Edit Goto Extras View System Help

Create Relationships

Allowed relationships

Position RTR1 Recruiter

Planning Status Active

Valid from 11/01/2008 to 12/31/9999 Change Information

Relationships 01 S 71012751 1

Relationship type/relationship A 002 Reports (line) to

Related Object

Type of related object S Position

ID of related object 71005381

Abbreviation 5381

Name SR HUMAN RESOURCE CONSULTANT

Priority



# Create Description

- The Description infotype is optional to provide information for:
  - General description
  - JVAC Points
  - In Training
  - Shift Designation



The screenshot shows a software window titled "Create Description". The menu bar includes "Infotype", "Edit", "Goto", "View", "System", and "Help". The toolbar contains various icons for file operations and editing. Below the toolbar, there are input fields for "Position" (RTR1), "Recruiter", "Planning Status" (Active), and "Validity" (11/01/2008 to 12/31/9999). A "Change Information" button is located to the right of the validity field. The main area of the window is titled "Description" and shows a list of options: "0001 General description", "0002 In Training", "0003 JVAC Points", and "0004 Shift Designation". The "0001 General description" option is currently selected. At the bottom of the window, there is a status bar showing "Ln 1, Co 1" and "Ln 1 - Ln 10 of 21 lines".


# Create Description

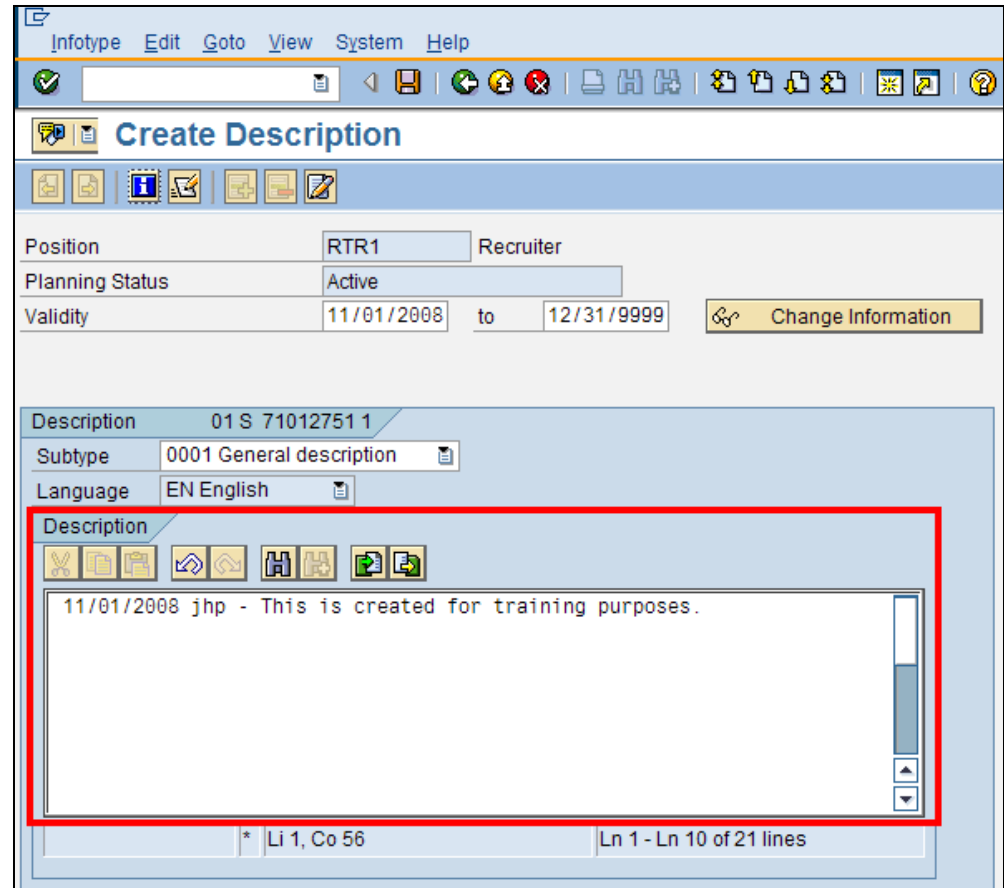
- Each Subtype will display in the action

12. Fields to complete:

- **Description**

13. Click  (**Enter**) to validate and click  (**Save**) to save

**Note:** Upon saving one description subtype, you are brought to the next description subtype. To skip any subtype, click  (**Cancel**).





# Essential relationship Employee Group/Subgroup

- The Employee Group/Sub-group infotype assigns the personnel structure to the position.

14. Fields to enter:

- Employee group
- EE subgroup

15. Click  (**Enter**) to validate and click  (**Save**) to save




Position	RTR1	Recruiter
Planning Status	Active	
Valid from	11/01/2008	to 12/31/9999
		
Employee Group/Subgroup 01 S 71012751 1		
Employee group	0 Permanent	
EE subgroup	06 M-OT Elig>40hrs/wk	

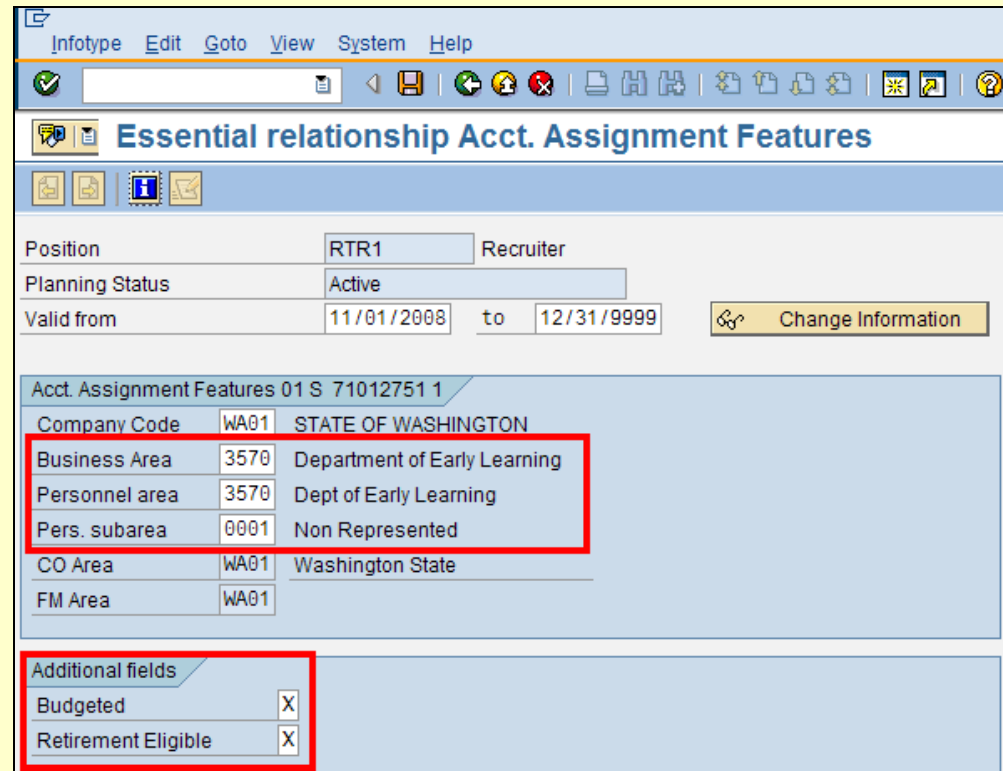
# Essential relationship Acct. Assignment Features

- The Essential relationship Acct. Assignment Features infotype assigns the Enterprise Structure and account assignment features to the position.

16. Fields to enter:

- **Business Area**
- **Personnel area**
- **Personnel sub-area**
- **Budgeted**
- **Retirement Eligible**

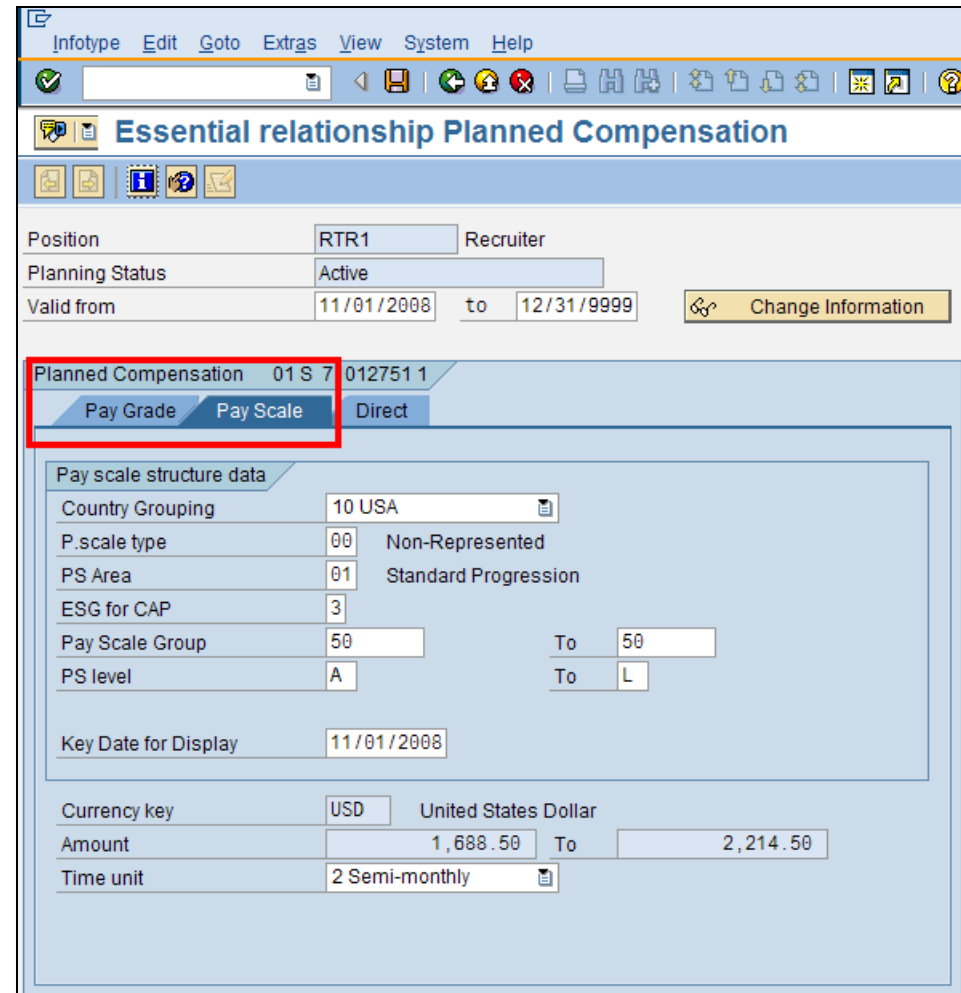
17. Click  (**Enter**) to validate and click  (**Save**) to save



Essential relationship Acct. Assignment Features		
Position	RTR1	Recruiter
Planning Status	Active	
Valid from	11/01/2008	to 12/31/9999
<a href="#">Change Information</a>		
Acct. Assignment Features 01 S 71012751 1		
Company Code	WA01	STATE OF WASHINGTON
Business Area	3570	Department of Early Learning
Personnel area	3570	Dept of Early Learning
Pers. subarea	0001	Non Represented
CO Area	WA01	Washington State
FM Area	WA01	
Additional fields		
Budgeted	<input checked="" type="checkbox"/>	
Retirement Eligible	<input checked="" type="checkbox"/>	

# Essential relationship Planned Compensation

- The Planned Compensation infotype defaults from the job relationship as pay grade or pay scale.
- You will not be able to override the compensation details for the position.
- There are two tabs that are used for compensation:
  - Pay grade (bands)
  - Pay scale (steps)



Infotype Edit Goto Extras View System Help

**Essential relationship Planned Compensation**

Position RTR1 Recruiter  
Planning Status Active  
Valid from 11/01/2008 to 12/31/9999 [Change Information](#)

Planned Compensation 01 S 7 012751 1

Pay Grade Pay Scale Direct

Pay scale structure data

Country Grouping 10 USA  
P.scale type 00 Non-Represented  
PS Area 01 Standard Progression  
ESG for CAP 3  
Pay Scale Group 50 To 50  
PS level A To L  
Key Date for Display 11/01/2008

Currency key USD United States Dollar  
Amount 1,688.50 To 2,214.50  
Time unit 2 Semi-monthly

# Essential relationship Planned Compensation – Pay Grade

The screenshot shows a software window titled "Display Planned Compensation". The main area displays salary structure data for position 0187, RULES MANAGER. The data is organized into several sections:



- Position Information:**
  - Position: 0187 RULES MANAGER
  - Planning Status: Active
  - Valid from: 01/01/2005 to 12/31/9999
- Planned Compensation:** 01 S 70081809 1
- Pay Grade Tab:**
  - Salary structure data
    - Ctry Grouping: 10 USA
    - Pay grade type: 00 Non-Represented
    - Pay grade area: 02 WMS
    - Pay grade: BAND 2
    - Pay grade level: 02 To 02
  - Key Date for Display: 10/28/2008
- Summary:**
  - Currency key: USD United States Dollar
  - Pay grade: 52,800.00 To 96,900.00
  - Reference salary: 0.00
  - Time unit: 6 Annually

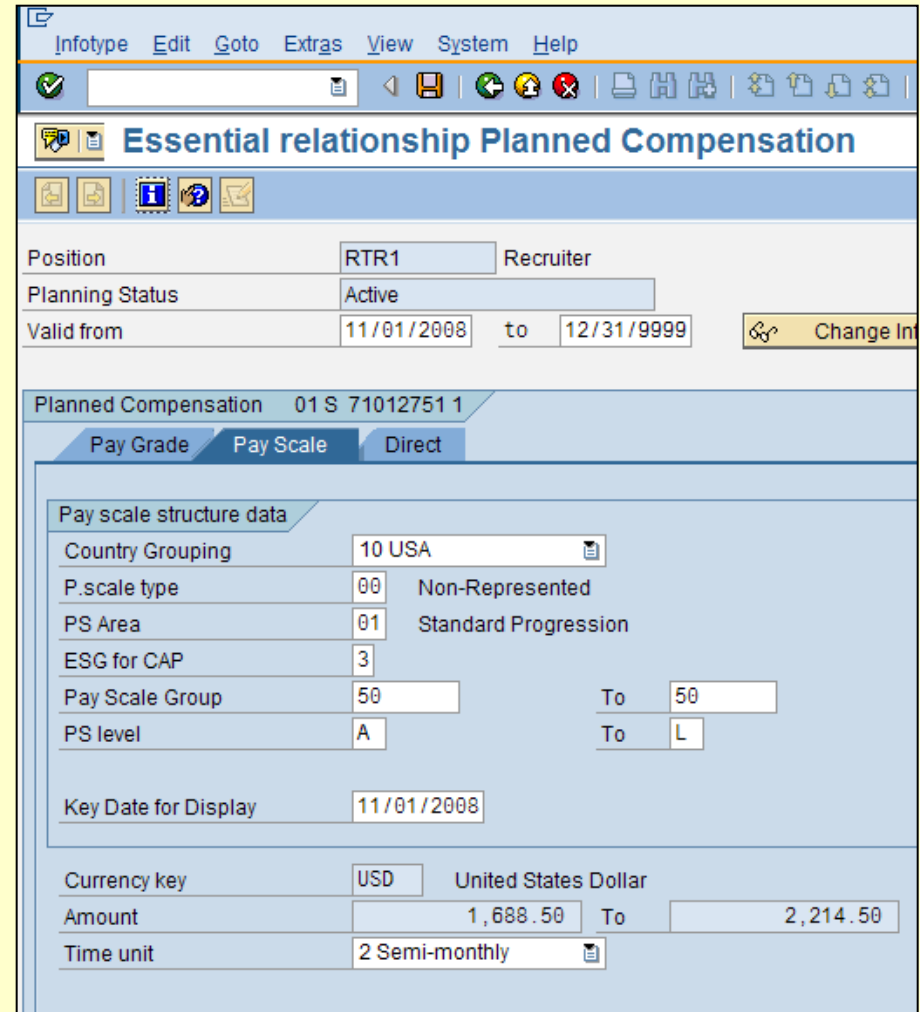
■ Pay grade tab is used for the following types of positions and will default in based on the relationship with the job, Personnel Sub-area and EE subgroup:

- WMS
- Higher Ed Exempt
- Students
- Non Classified Elected Official
- Non Classified Exempt Management Service
- Non Classified Non Pay Scale
- Non Classified Board Members

# Essential relationship Planned Compensation – Pay Scale

- The Pay Scale tab is used for all other types of position and will default in based on the relationship with the job, Personnel Sub-area and EE Sub-group.

18. Once the information has been verified, click  (**Enter**) to validate and click  (**Save**) to save

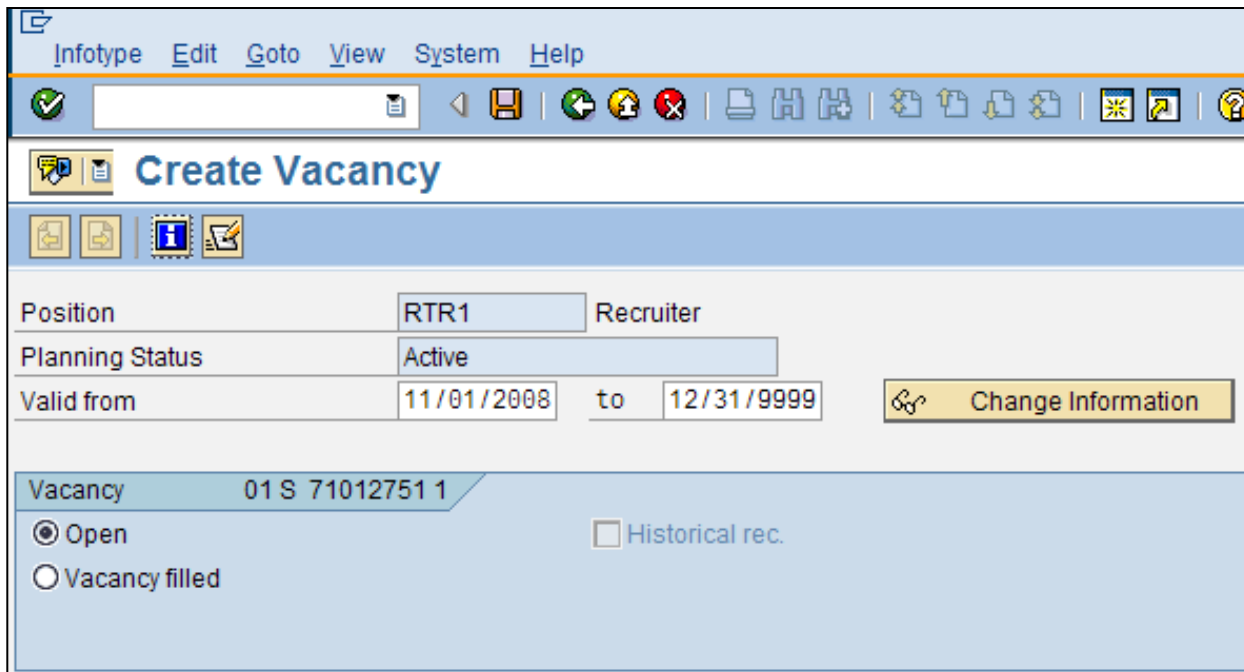


Position	RTR1	Recruiter
Planning Status	Active	
Valid from	11/01/2008	to 12/31/9999
Planned Compensation 01 S 71012751 1		
Pay Grade Pay Scale Direct		
Pay scale structure data		
Country Grouping	10 USA	
P. scale type	00	Non-Represented
PS Area	01	Standard Progression
ESG for CAP	3	
Pay Scale Group	50	To 50
PS level	A	To L
Key Date for Display	11/01/2008	
Currency key	USD	United States Dollar
Amount	1,688.50	To 2,214.50
Time unit	2 Semi-monthly	

# Create Vacancy

- Use the *Vacancy* infotype to identify positions that are currently vacant or filled by running a report.
- You can create a *Vacancy* infotype record for a position that is occupied or unoccupied.

19. Click  (**Enter**) and then click  (**Save**).



The screenshot shows the SAP 'Create Vacancy' infotype form. The menu bar includes 'Infotype', 'Edit', 'Goto', 'View', 'System', and 'Help'. The toolbar contains various icons for navigation and actions. The form fields are as follows:

Position	RTR1	Recruiter
Planning Status	Active	
Valid from	11/01/2008	to 12/31/9999

There is a 'Change Information' button with a magnifying glass icon. Below the form fields, the 'Vacancy' section shows '01 S 71012751 1'. There are two radio buttons: 'Open' (selected) and 'Vacancy filled'. A checkbox labeled 'Historical rec.' is also present.





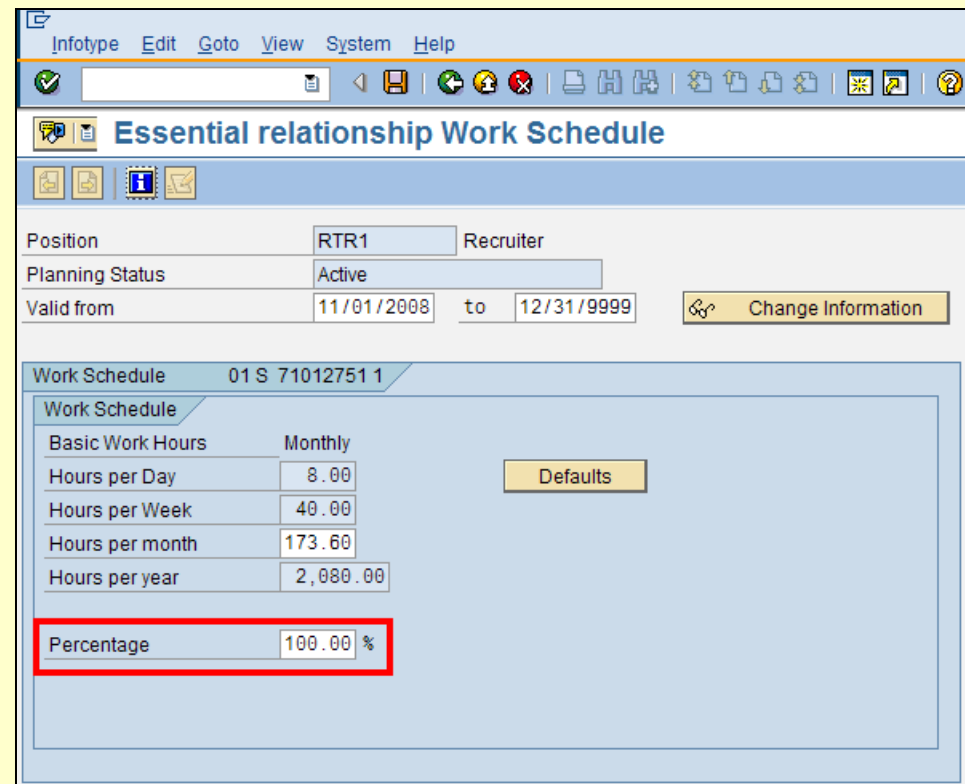
# Essential relationship Work Schedule

- The Work Schedule infotype defines the percentage for a position's work schedule, specifically part-time or full-time.

20. Field to enter

– **Percentage**

21. Click  (**Enter**) to validate and click  (**Save**) to save



Infotype Edit Goto View System Help

**Essential relationship Work Schedule**

Position: RTR1 Recruiter  
Planning Status: Active  
Valid from: 11/01/2008 to 12/31/9999 [Change Information](#)

Work Schedule 01 S 71012751 1

Work Schedule	
Basic Work Hours	Monthly
Hours per Day	8.00
Hours per Week	40.00
Hours per month	173.60
Hours per year	2,080.00
Percentage	100.00 %

[Defaults](#)

**Note:** The Defaults button can populate work schedule fields for full-time positions.

# Essential relationship Cost Distribution

■ The Cost Distribution infotype assigns the cost center to which the position's costs is incurred.

## 22. Fields to complete:

- Controlling area
- Cost center
- Percentage
- Fund
- Functional Area
- Cost Object
- AFRS Project
- AFRS Allocation

Infotype Edit Goto View System Help

**Essential relationship Cost Distribution**

Position: RTR1 Recruiter

Planning Status: Active

Start date: 11/01/2008 to 12/31/9999 [Change Information](#)



Cost Distribution 01 S 71012751 1

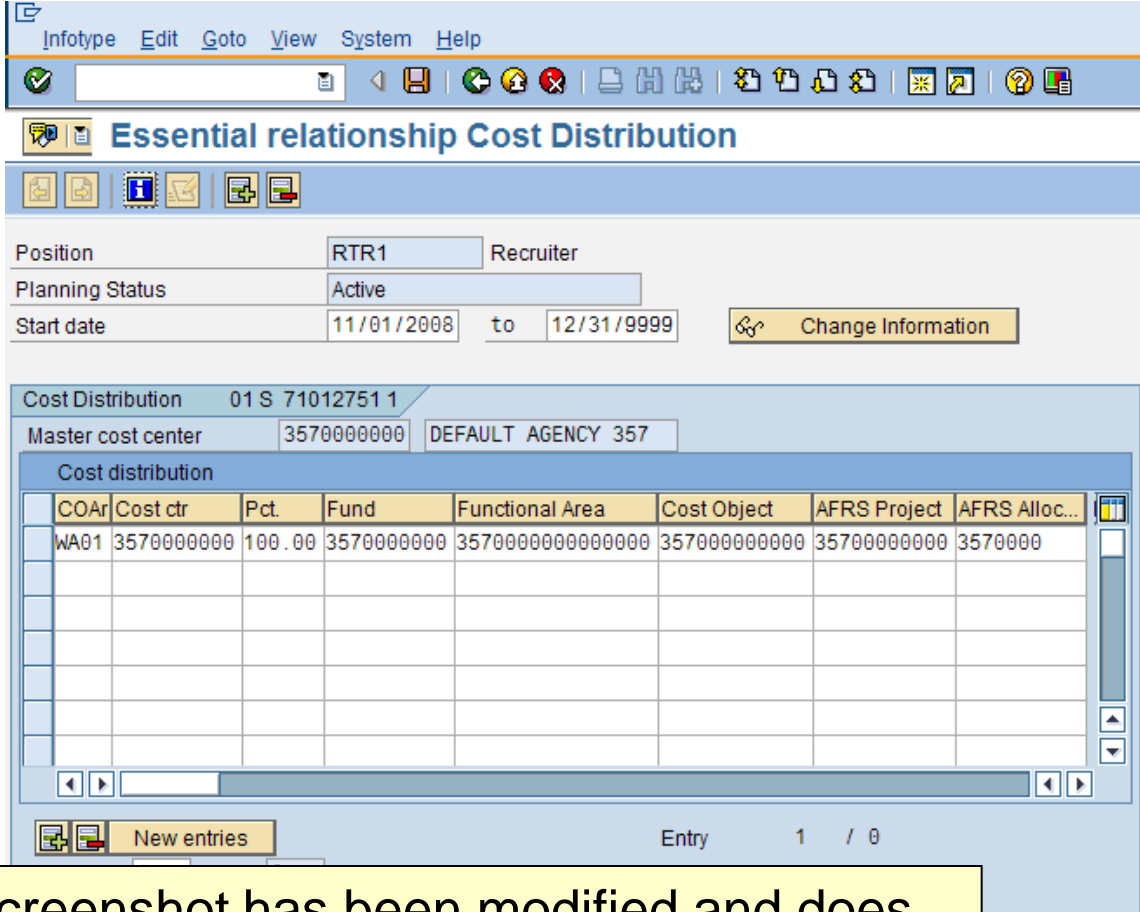
Master cost center: 3570000000 DEFAULT AGENCY 357

COAr	Cost ctr	Pct.	Fund	Functional Area	Cost Object	AFRS Project	AFRS Allocation

[New entries](#) Entry 1 / 0

# Essential relationship Cost Distribution – cont'd

23. Click  (Enter) to validate and click  (Save) to save



Position RTR1 Recruiter

Planning Status Active

Start date 11/01/2008 to 12/31/9999 [Change Information](#)

Cost Distribution 01 S 71012751 1

Master cost center 3570000000 DEFAULT AGENCY 357

COAr	Cost ctr	Pct.	Fund	Functional Area	Cost Object	AFRS Project	AFRS Alloc...
WA01	3570000000	100.00	3570000000	3570000000000000	357000000000	357000000000	3570000

New entries Entry 1 / 0

**Note:** The above screenshot has been modified and does not reflect all fields.

# Cost Distribution Fields

HRMS Field Name	SOW Accounting Object	Code Calculation	Format	Example (DOP)
Cost Center	Organizational Index	Three character business area + AFRS Org. Index + 000	AAAXXXX000	111H110000
Fund	Appropriation Index & Fund	Three character business area + AFRS Fund + AFRS Appropriation Index + 0	AAAXXXXXX0	1114199020
Functional Area	Program Index	Three character business area + AFRS Program Index + 00000000	AAAXXXXX00000000	1110990000000000
Cost Object	Master Index	Three character business area + AFRS Master Index + 0	AAAXXXXXXXXX0	111000130000
AFRS Project	Project, Sub Project & Phase	Three character business area + AFRS project + AFRS subproject + AFRS Project Phase	AAAXXXXXXXXX	11191010000
AFRS Allocation	Allocation	Three character business area + AFRS Allocation Code	AAAXXXX	1110000

## Legend:

A - Three Character business area



X- The AFRS accounting object embedded within the field

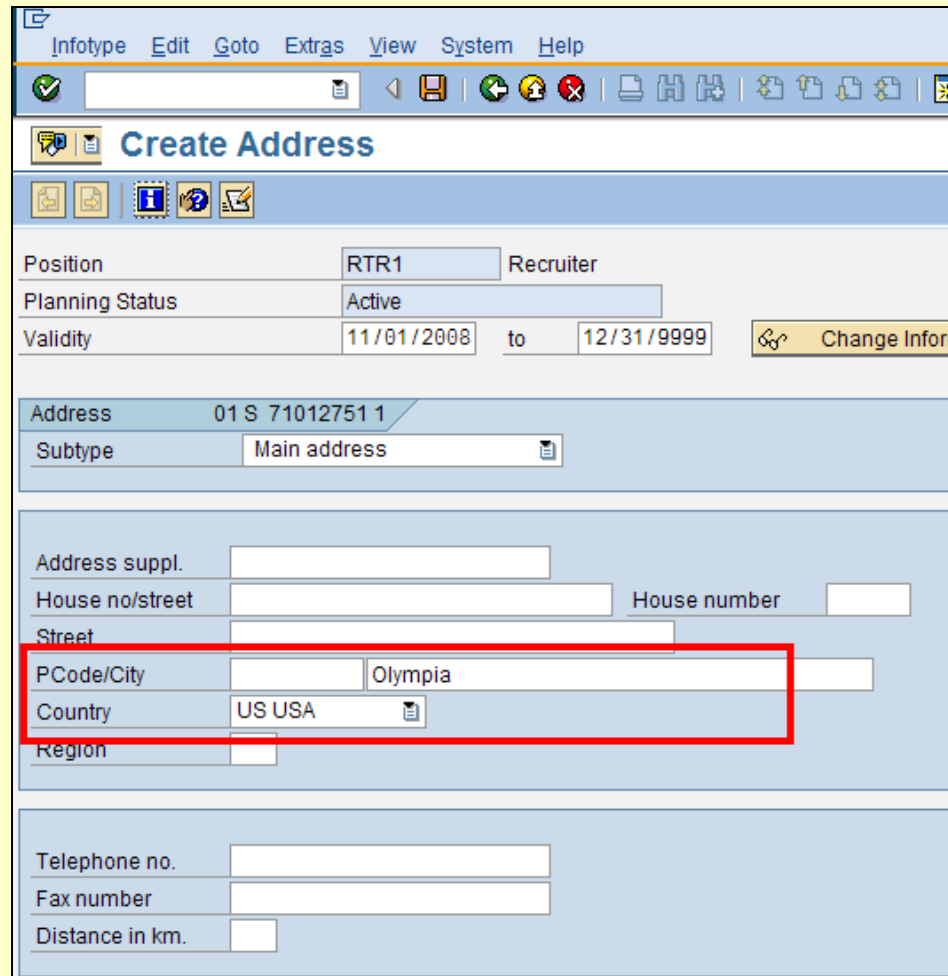
0- filler characters, usually 0

## Example explanation:

111H110000 – Agency 111, AFRS Org Index H110, 000

# Create Address

- The Address infotype stores the address for the position's location
24. Required fields to enter:
- **City**
  - **Country**
- Optional fields include:
- *Street address*
  - *Phone number*
- Data is used for reference purposes only
25. Click  (**Enter**) to validate and click  (**Save**) to save




Infotype Edit Goto Extras View System Help



**Create Address**

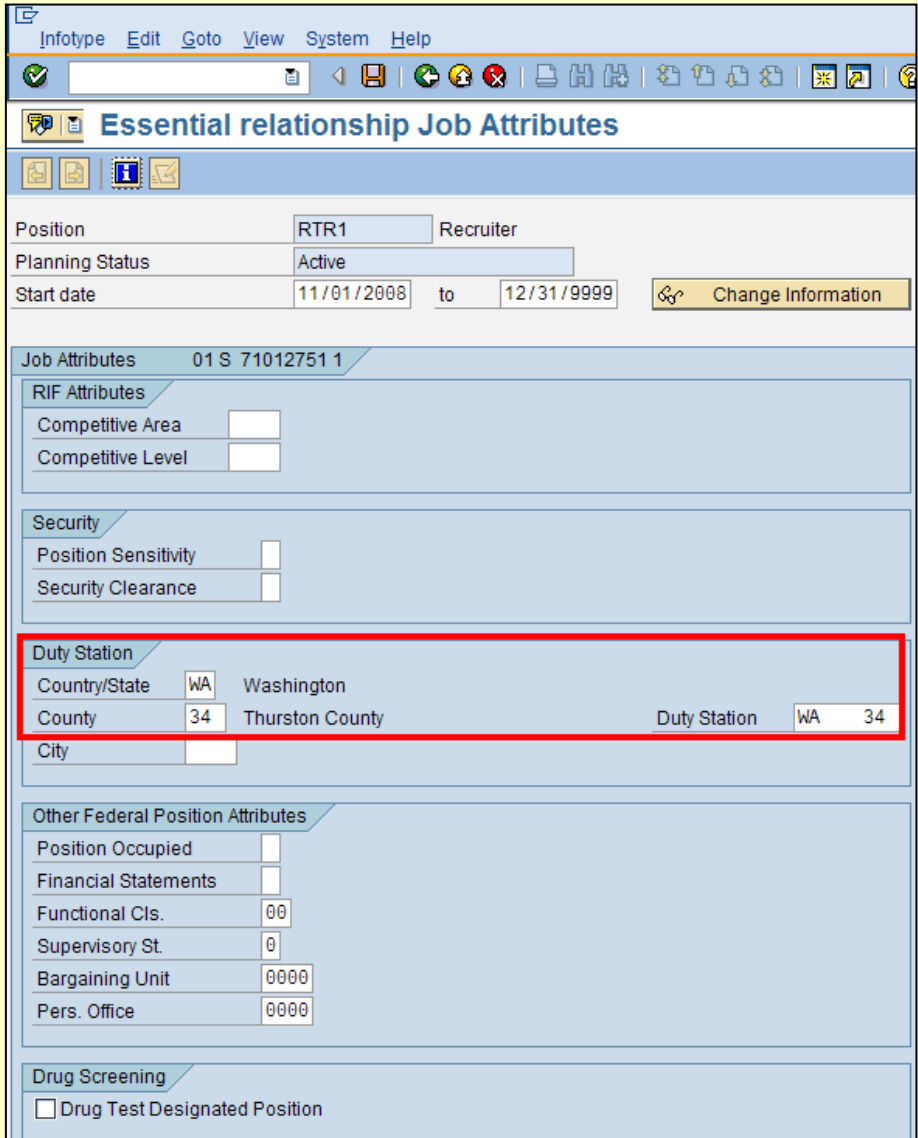
Position RTR1 Recruiter  
Planning Status Active  
Validity 11/01/2008 to 12/31/9999 [Change Information](#)

Address 01 S 71012751 1  
Subtype Main address

Address suppl.   
House no/street  House number   
Street   
PCode/City  Olympia  
Country  US USA   
Region   
Telephone no.   
Fax number   
Distance in km.

# Essential relationship Job Attributes

- The Essential relationship Job Attributes infotype to stores the county that the position is created in
26. Field to Enter:
- **Country/State**
    - Use Capital Letters (WA)
  - **County**
- Optional field to complete:
    - Security Clearance
  - Data is used for reference purposes only
27. Click  (**Enter**) to validate and click  (**Save**) save



Infotype Edit Goto View System Help

**Essential relationship Job Attributes**

Position RTR1 Recruiter  
Planning Status Active  
Start date 11/01/2008 to 12/31/9999 [Change Information](#)

Job Attributes 01 S 71012751 1

**RIF Attributes**  
Competitive Area   
Competitive Level

**Security**  
Position Sensitivity ☐  
Security Clearance ☐

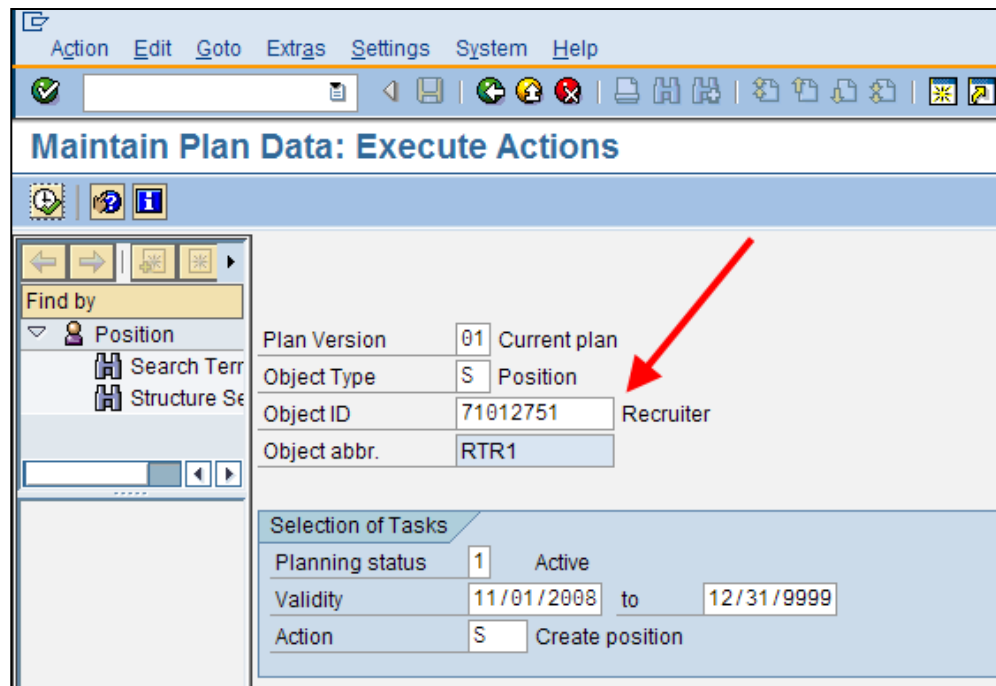
**Duty Station**  
Country/State WA Washington  
County 34 Thurston County  
City   
Duty Station WA 34

**Other Federal Position Attributes**  
Position Occupied ☐  
Financial Statements ☐  
Functional Cls. 00  
Supervisory St. 0  
Bargaining Unit 0000  
Pers. Office 0000

**Drug Screening**  
☐ Drug Test Designated Position

# Maintain Plan Data: Execute Actions

- After saving the Essential relationship Job Attributes infotype, you will be taken back to the beginning of the Maintain Plan Data: Execute Actions.
- The HRMS Object ID number for the Position you created will be in the Object ID field.



Plan Version	01	Current plan
Object Type	S	Position
Object ID	71012751	Recruiter
Object abbr.	RTR1	

Selection of Tasks		
Planning status	1	Active
Validity	11/01/2008	to 12/31/9999
Action	S	Create position

# Possible Hand-offs

- After creating the position, contact your agency's Security Authorization Administrator to assign the HRMS security profile to the position if it has roles that require HRMS access.
- The Personnel Administrator Processor may also need to be contacted if the position will be used for a hire action.





# Possible Hand-offs – cont'd

- During the a Hire action (**PA40**), a position is entered on *Actions* (0000). Once the infotype has been validated, the default values are distributed through the hire action's infotypes.

Infotype Edit Goto Extras System Help

✓ [Icon] [Icon] [Icon] [Icon] [Icon] [Icon]

**Create Actions (0000)**

[Icon] [Icon] [Icon] [Icon] Change info group

Pers.No. [Text Box]

Start 11/01/2008 to 12/31/9999

**Personnel action**

Action Type U0 New Hire [Icon]

Reason for Action ☒

Reference Pers. Nos. [Text Box]

**Status**

Employment 3 Active

**Organizational assignment**

Position [Text Box] ☒

Personnel area [Text Box]

Employee group [Text Box]

Employee subgroup [Text Box]

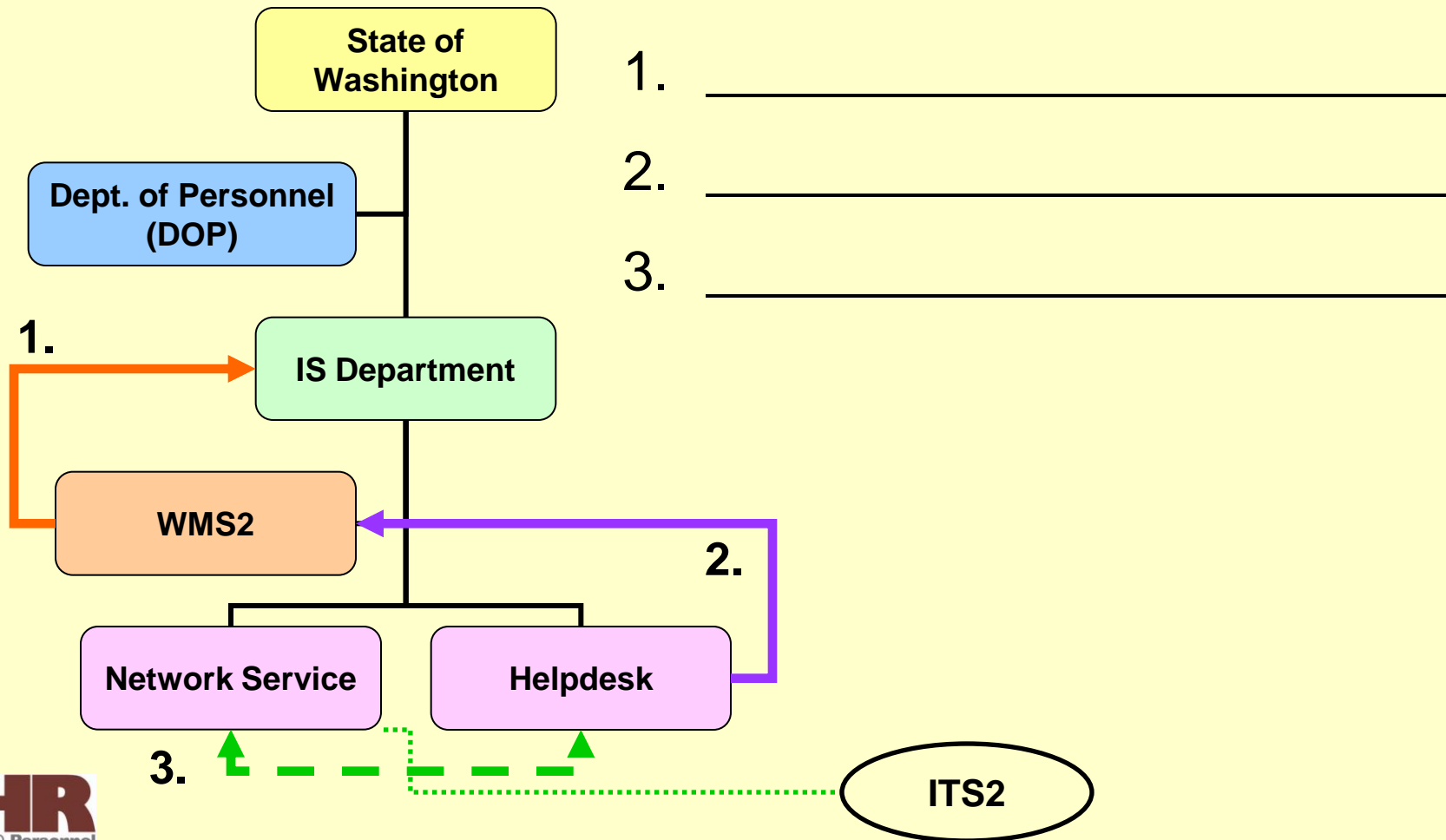
# **HRMS Activity**



**Create Position Action  
Walk-through and Exercise**

# Review Questions

1. List the 3 types of relationships established during the Create Position action (PP03).



# Review Questions

2. Match the relationships:

1) Position to Organizational Unit
2) Position to Job
3) Position to Position

a) A002 – Reports (line) to
b) A003 – Belongs to
c) B007 – Is described by

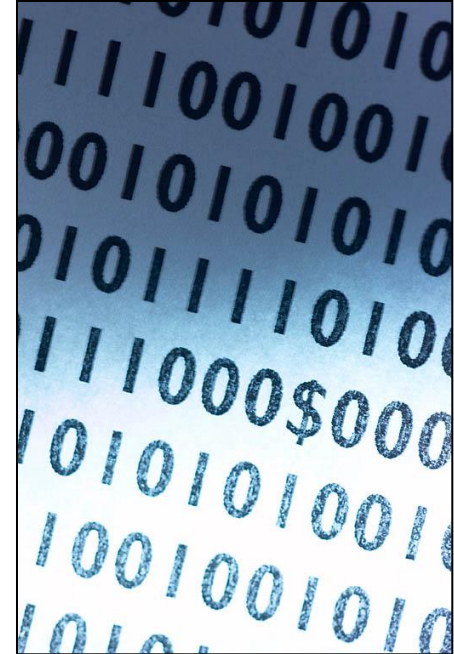
## Section 3b: Maintain Positions

- Once a position has been created, it can be modified using the Maintain Position action (**PO13**)
- The following infotypes can be modified:
  - *Object* (1000)
  - *Relationships* (1001)
  - *Description* (1002)
  - *Planned Compensation* (1005)
  - *Vacancy* (1007)
  - *Acct. Assignment Features* (1008)
  - *Work Schedule* (1011)
  - *Employee Group / Subgroup* (1013)
  - *Cost Distribution* (1018)




# Organizational Management Transactions

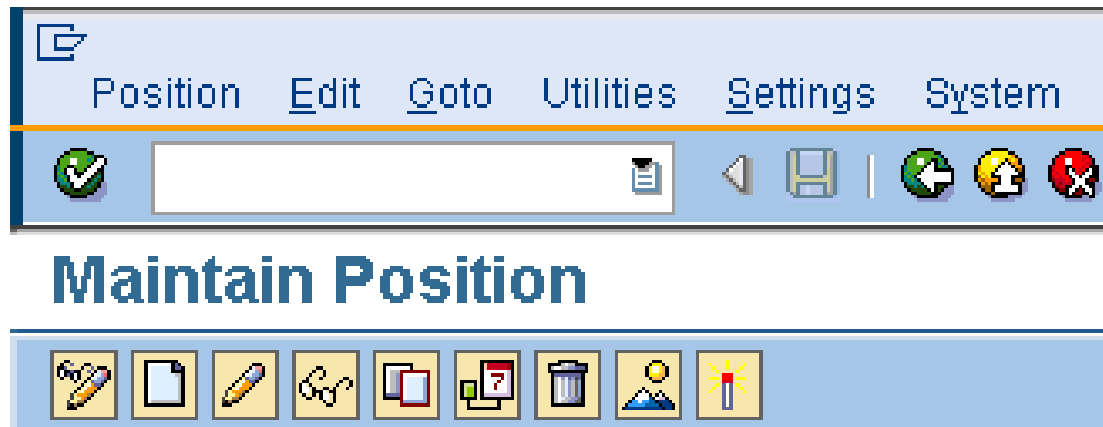
## ■ Position

- Create Position **PP03**
- Display Position **PO13D**
- Maintain Position **PO13**




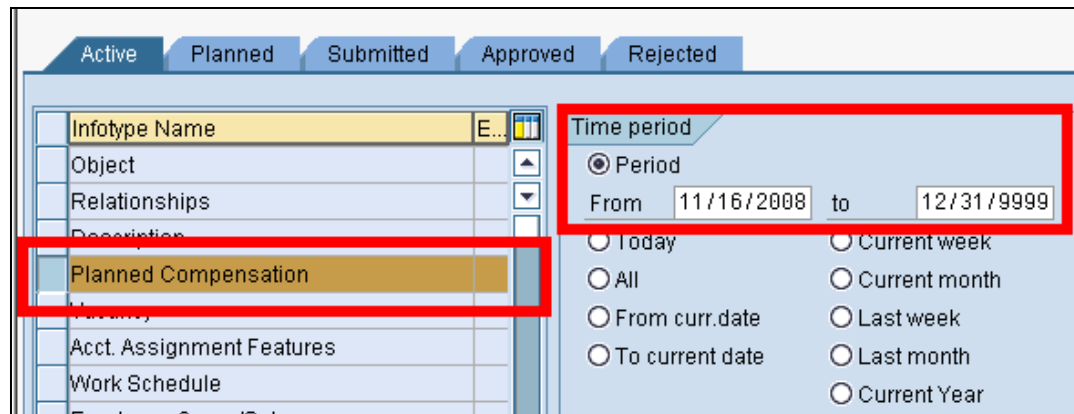
# Maintain Function Keys

- Click  (**Create**) to create a new record
- To update the infotype and record the history, click  (**Copy**)
  - The new start date of the record will be used for the current information. This will end date the existing record and reduces data entry.
- To change/correct the infotype with no history, click  (**Change**)



# Planned Compensation Updates

- When updating a position's Planned Compensation, use the Create function.
- Enter the effective date of the change in the Time Period section before clicking on  (**Create**) on the Application tool bar.
- Pay close attention to the Pay Scale Type (non-represented vs. represented). It will default information based on the job relationship, Personnel Sub-area and EE Sub-group.




The screenshot displays a software interface for managing compensation. At the top, there are tabs: Active, Planned, Submitted, Approved, and Rejected. Below these, a list of items is shown, including Infotype Name, Object, Relationships, Description, Planned Compensation, Salary, Acct. Assignment Features, Work Schedule, and Employee Group/Subgroup. The 'Planned Compensation' item is highlighted with a red box. To the right, the 'Time period' section is also highlighted with a red box. It contains a radio button for 'Period' (which is selected), and two date fields: 'From 11/16/2008' and 'to 12/31/9999'. Below these are several radio buttons for different time periods: Today, All, From curr.date, To current date, Current week, Current month, Last week, Last month, and Current Year.



# Object Start Dates

## Scenario 1:

- If a position is created with the incorrect start date such as a future date, the Object infotype can be updated using the  (**Copy**) function along with the other affected infotypes.
  - Once updated, the incorrect date will be overridden.

## Scenario 2:

- If a position is created with a past start date, the date cannot be changed, but can be deleted.
  - A position can be deleted if it has not been filled.

# **HRMS Activity**



**Maintain Position  
Exercise**

# Scenario 3c: Delimit Positions

- When you delimit a position, all relationships will be delimited.
  - Review the *Relationships* Infotype to verify that there are no active relationships with positions or people that report to the position you are delimiting.



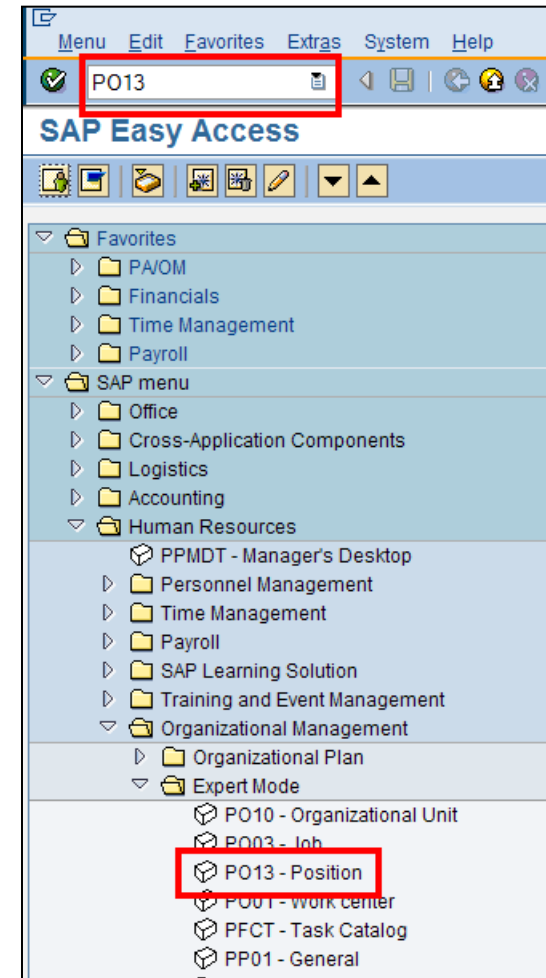
# Delimit Positions – cont'd

- You automatically delimit individual infotype records when you create and save a copy of an infotype record.
- You can also delimit the entire position if it is no longer needed due to reorganizations or for other business reasons.
  - This will delimit the position's attributes and relationships.





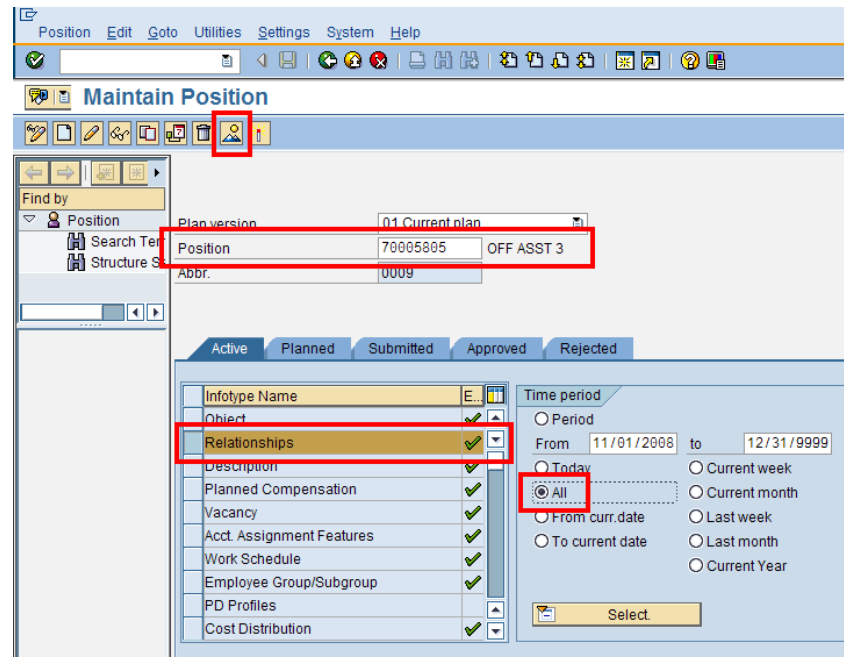
# Delimit a Position action

1. To delimit a position use the Maintain Position action:
  - Follow the menu path Human Resources → Organizational Management → Expert Mode → Position
  - Or transaction code **PO13** in the **Command** field



# Delimit Position(s)

2. To view position relationships, enter the position number and click  (**Enter**) to validate
3. In the Time period field, click the radio button for 'All'
4. Click the gray box to the left of Relationships
5. Click  (**Overview**) for an overview of all actions associated with *Relationships* (1001)



Position Edit Goto Utilities Settings System Help

Maintain Position

Find by

Position Plan version 01 Current plan

Position 70005805 OFF ASST 3

Addr. 0009

Active Planned Submitted Approved Rejected

Infotype Name E. Relationships

Object

Description

Planned Compensation

Vacancy

Acct. Assignment Features

Work Schedule

Employee Group/Subgroup

PD Profiles

Cost Distribution

Time period

From 11/01/2008 to 12/31/9999

Today

All

From curr. date

To current date

Current week

Current month


Last week

Last month

Current Year

Select

# Delimit Position(s)

- You can determine the type of relationship by viewing the relationship type and the relationship object type.
  - Example :
    - A003 Belongs to O (Organizational Unit)
    - B002 Is line supervisor of S (Position)
    - A008 Holder (Person)
6. To return to Maintain Position, click  (**Exit**) to exit

Help

Navigation icons: back, forward, home, search, print, etc.

### Manage Relationships


0009 OFF ASST 3

Active

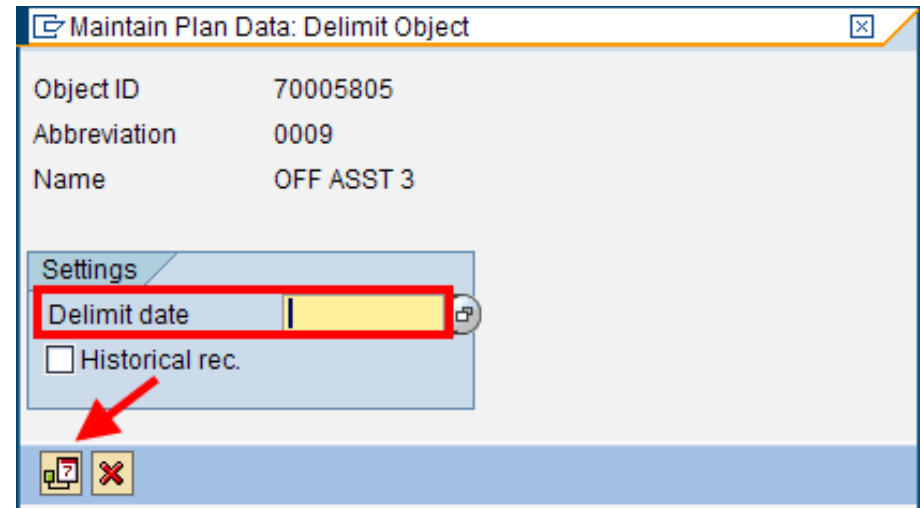
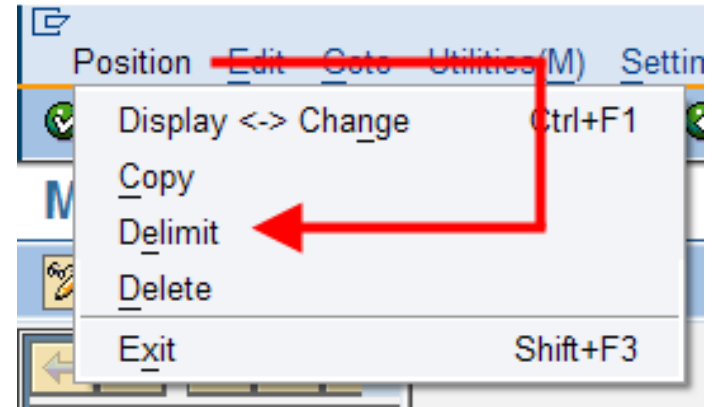
01 S 70005805 1

	Rel. type	Relationship	Relat.text	Rel'd object type	Rel'd object ID	Abbr.
31/9999	A	003	Belongs to	O	30000497	AF
31/9999	A	008	Holder	P	Personnel #	Last Name
31/9999	B	007	Is describ	AG	CR3P_CE_I...	CR3P_CE_IN...
31/9999	B	007	Is describ	AG	SR3P_SOW_...	SR3P_SOW_...
31/9999	B	007	Is describ	C	50000274	100J

# Delimit Position

7. On the Menu Bar select Position → Delimit from the Menu bar
8. A Maintain Plan Data Delimit Object box will Pop-up
9. Enter the Delimit date
10. Click  (**Delimit Record**)

**Note:** Do not check the Historical rec. box when delimiting. If checked, the record cannot be changed.

A screenshot of a dialog box titled 'Maintain Plan Data: Delimit Object'. It contains the following fields:

- Object ID: 70005805
- Abbreviation: 0009
- Name: OFF ASST 3

Below these is a 'Settings' section with:

- 'Delimit date' field: A text box with a yellow background and a calendar icon on the right. It is highlighted with a red rectangle.
- 'Historical rec.' checkbox: An unchecked checkbox.

At the bottom left, there are two icons: a 'Delimit Record' icon (a document with a red 'X') and a close button (an 'X' in a square). A red arrow points to the 'Delimit Record' icon.



# **HRMS Activity**



## **Delimit Position Exercise**

# What else do I need to know?

- See OLQR User Procedures:
  - Position Action Create
  - Position\_Delimit
  - Position Compensation – Maintain
  - Position Description – Maintain
  - Employee Group and Sub-group to Position\_Create and Maintain



# **Section 4:**

# **Organizational**

# **Management Reports**

# Organizational Management Reports

Upon completion of this section you will be able to:

- List and run some of the organizational management reports.
- Describe how the reports may be used.

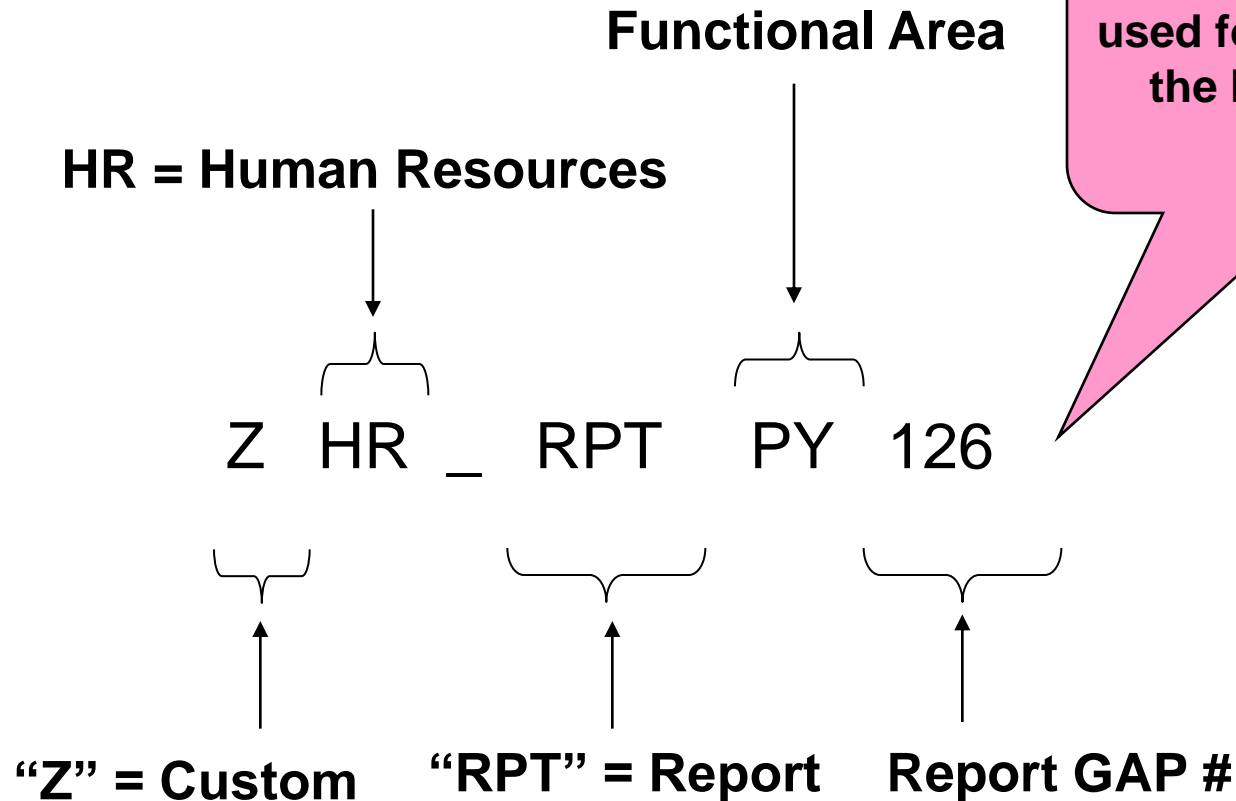


# Reporting in HRMS

- HRMS integration provides the capability to run reports within Personnel Areas (agencies or sub-agencies).
- Generating reports allows you to process information quickly to support decision making.
- Ability to export and manipulate “real-time” data.



# HRMS Customized Reporting - Transaction Code Map



The Transaction Code used for this example is the Payroll Posting Report.

## Functional Areas:

PY – Payroll

PA – Personnel Administration

OM – Organizational Management

TM – Time Management

BN - Benefits

# HRMS Reporting – OLQR Resources

Visit the OLQR website

(<http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference/>) for the following:

- HRMS Reports
  - [Variants Create and Retrieve](#)
- Job Aids A-Z

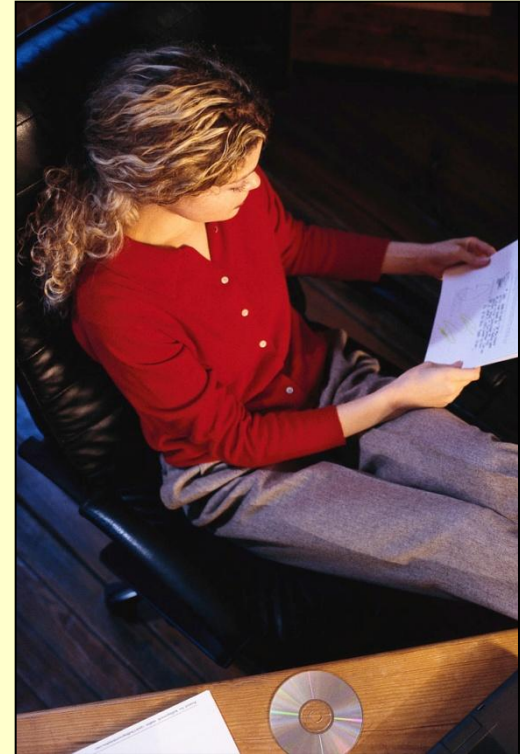


Visit the HRMS Support website

(<http://www.dop.wa.gov/HRMS/CustomerSupport/>) for a list of all Statewide variants.


# Complete Position Description

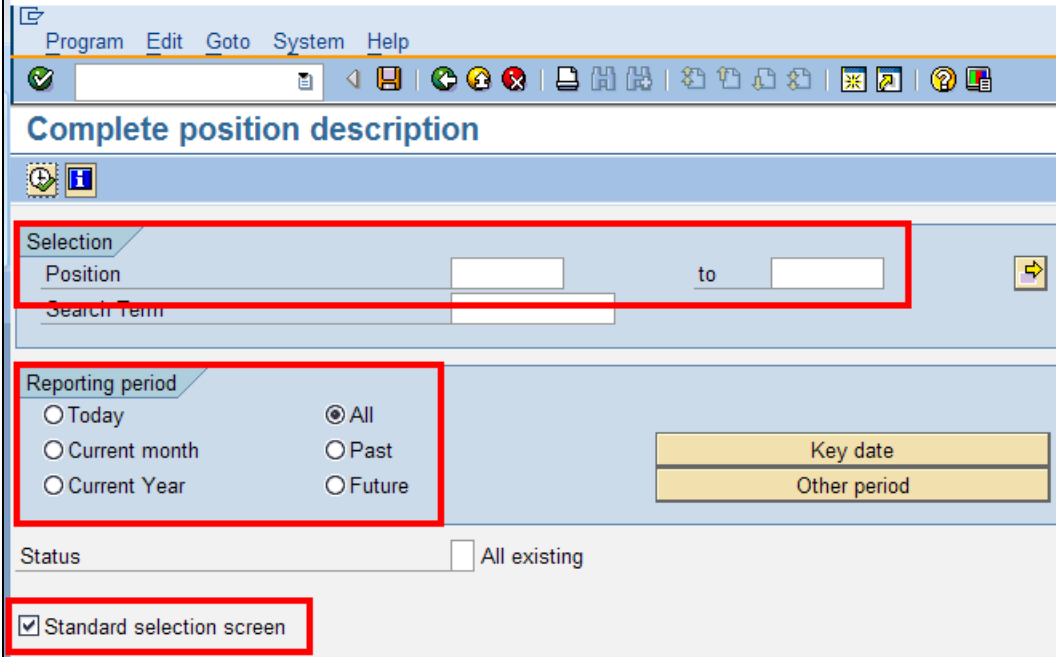
- Use the report to view a summary of select infotype records that are created for a position.
  - General description
  - In-training
  - JVAC
  - Shift Designation
- Run the report when analysis on Position Description is needed.
- Access the report using the transaction code **S\_AHR\_61016511**.






# Complete Position Description

1. As required, enter the Position number (use matchcode for ease of selection – see the *Additional Information* section for further instruction)
2. In the reporting period, select the radio button 'All'
3. Click 'Standard selection screen' box to customize the display options
4. Click  (Execute)

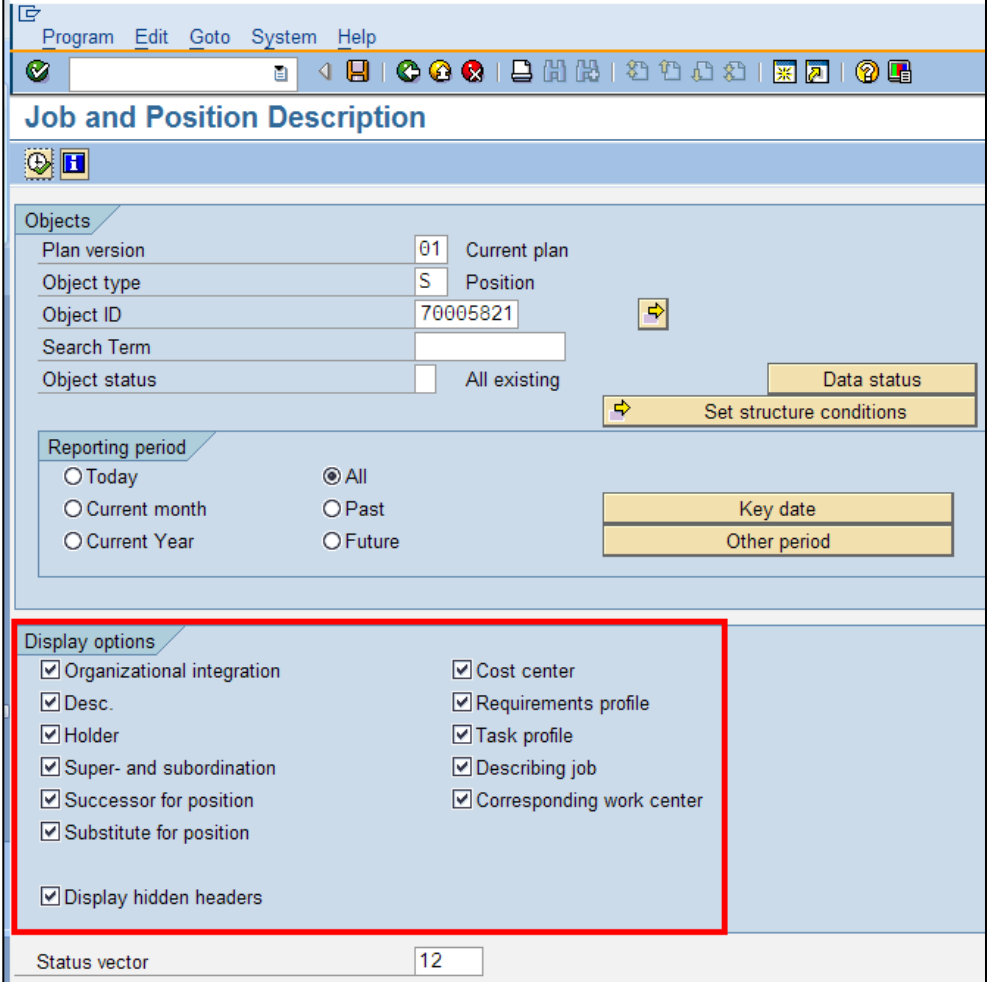


**Note:** When selecting more than one object, utilize the  (Select Subtree) function found in the Structure Search.

# Complete Position Description (S\_AHR\_61016511)

- You can customize the infotypes that display on the report by checking the desired boxes in the *Display options* field.

5. Click  **(Execute).**



The screenshot shows the SAP 'Job and Position Description' interface. The 'Objects' section includes fields for Plan version (01), Object type (S), Object ID (70005821), Search Term, and Object status (All existing). The 'Reporting period' section has radio buttons for Today, Current month, Current Year, All, Past, and Future. The 'Display options' section, highlighted with a red box, contains the following checked options:

- ☒ Organizational integration
- ☒ Desc.
- ☒ Holder
- ☒ Super- and subordination
- ☒ Successor for position
- ☒ Substitute for position
- ☒ Display hidden headers
- ☒ Cost center
- ☒ Requirements profile
- ☒ Task profile
- ☒ Describing job
- ☒ Corresponding work center

Buttons for 'Data status', 'Set structure conditions', 'Key date', and 'Other period' are also visible. The 'Status vector' field at the bottom is set to 12.

## Complete Position Description

Position Description	
Plan version : 01    Current plan    Status vector: 12    Reporting period: 01/01/1900 - 12/31/9999	
<b>Position</b>	
S 70005821 ADM ASST 3	Position S 70005821 ADM ASST 3
<b>Approved hours per month</b>	
Approved hours	
173.60	
<b>Organizational integration</b>	
Key	Object Description
O 30000493	ADMINISTRATIVE SERVICES
<b>Desc.</b>	
Description	
In Training:	
In Training	
Shift Designation:	
1-Days	
<b>Holder</b>	
Description	
Position unoccupied since:12/31/9999 Position has been vacant since:07/01/2007	
<b>Describing job</b>	
Key	Object Description
C 50000286	SECRETARY LEAD
C 50000286	SECRETARY LEAD
C 51000780	ADMINISTRATIVE ASSISTANT 3

# **HRMS Activity**




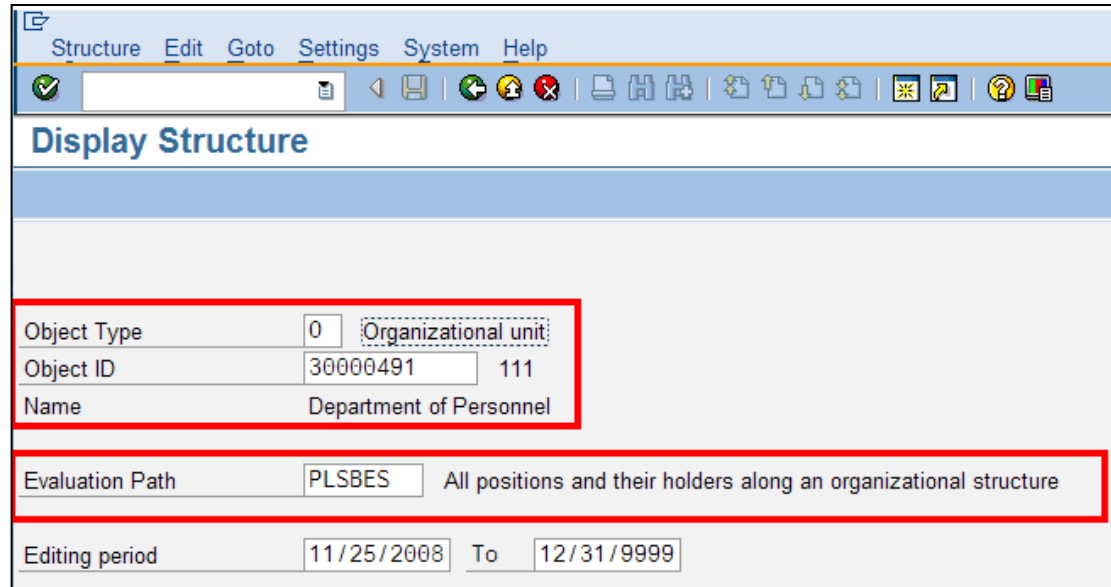
## **Complete Position Description Report Walkthrough**

# Display Structure

- Use the report to display the organizational plan based on the object type and evaluation path entered.
  - For example, this report can be used to display all jobs, persons, organizational units, and position based on the relationship type.
    - Position to Person
    - Organizational Unit to Cost Center
- Run the report when analysis is needed.
- Access the report using the transaction code **PPSS**.

# Display Structure

- As required, complete the following fields:
  - Object type
    - O – Org Unit
  - Object ID
    - Use matchcode
  - Evaluation Path
    - PLSBES
  - Editing period
- Click  (**Enter**)



Object Type	0	Organizational unit
Object ID	30000491	111
Name	Department of Personnel	
Evaluation Path	PLSBES	All positions and their holders along an organizational structure
Editing period	11/25/2008	To 12/31/9999

# Viewing Results: Display Structure

Structure Edit Goto View System Help

All positions and their holders along an organizat...: Display

Organizational unit

- 0 30000491 111 Department of Personnel
  - 0 30000493 AB ADMINISTRATIVE SERVICES
    - S 70005821 0031 ADM ASST 3
      - P 20022672 Mouse Mouse Minnie
    - S 70005828 0041 PROCUREMENT & SUPPLY SPEC 1
    - S 70005842 0067 FACILITY SERVICES MANAGER
    - S 70005845 0071 SEC ADMIN
    - S 70005878 0148 FINANCIAL SERVICES MANAGER
    - S 70005881 0170 MGR OFF SVC 1
    - S 70005887 0188 EMPLOYEE ASSISTANCE PROGRAM MANAGER
    - S 70005912 0290 PROG SPEC 3
    - S 70005913 0291 COMBINED FUND DRIVE PROGRAM MANAGER
    - S 70005915 0294 CONTRACTS ADMINISTRATOR
    - S 70005917 0296 BINDERY WORKER 2
    - S 70081785 0032 BUDGET ANALYST 3
    - S 70081789 0042 EMP ASSIST ASSOC
    - S 70081790 0045 FISCAL ANALYST 2
    - S 70081794 0064 FISCAL ANALYST 2
    - S 70081806 0153 EMP/AST PF EX SU
    - S 70081815 0256 EMP ASSIST ASSOC
    - S 70081816 0258 FISCAL ANALYST 4
    - S 70081818 0262 CONTRACTS SPEC 2
    - S 70081819 0267 EMP/AST PF EX SU
    - S 70081820 0268 EMP/AST PF EX SU
    - S 70081823 0295 FISCAL ANALYST 2
    - S 70081832 0333 EAP EXPERT/SUPERVISOR
    - S 70081834 0344 FISCAL TECH 2

# HRMS Activity



## Display Structure Walkthrough




# Structure Display/Maintenance

- Use the report to display the organizational plan based on the object type and evaluation path entered.
  - For example, this report can be used to display all jobs, persons, organizational units that are assigned to a specific position.
- Run the report when analysis is needed.
- Access the report using the transaction code **S\_AHR\_61016528**.



# Structure Display/Maintenance

- As required, enter the following fields:
  1. Object type
    - O Org Unit
  2. Object ID
    - (use matchcode)
  3. Select a Reporting period
  4. Evaluation Path
    - PLSBES
  5. Click  (**Execute**)

Program Edit Goto System Help

## Structure Display/Maintenance

Objects

Plan version 01 Current plan

Object type 0 Organizational unit

Object ID 30000491

Search term

Object status All existing

Data status

Set structure conditions

Reporting period

☒ Today ☐ All

☐ Current month ☐ Past

☐ Current Year ☐ Future

Key date

Other period

Structure parameters

Evaluation Path PLSBES All positions and their holders al

Status vector ☐ Status overlap

Display depth

Further conditions

Technical depth

☐ Recursion

☐ Classic Output

# Viewing Results: Structure Display/Maintenance

Structure Display Edit Goto System Help

Structure Display/Maintenance

Plan Version: 01  
 Evaluation Path: PLSBES (All positions and their holders along an organizat)  
 Depth: 0  
 Status Vector: 1  
 Key Date: 12/01/2008

Object Description	Object abbr.	Object Type	Extended object ID	Status ...	Start Date (Object)	End Date (Obje...	Status (Relations...	Start Date (Relationship)	End Date (...)	Percen...
ADMINISTRATIVE SERVICES	AB	O	30000493	1	01/01/2005	12/31/9999	1	01/01/2005	12/31/9999	
PROG SPEC 3	0028	S	70005819	1	01/01/2005	12/31/9999	1	01/01/2005	12/31/9999	
Employee's Name		P	Personnel Number	1	01/01/2005	12/31/9999	1	01/01/2006	12/31/9999	100.00 %

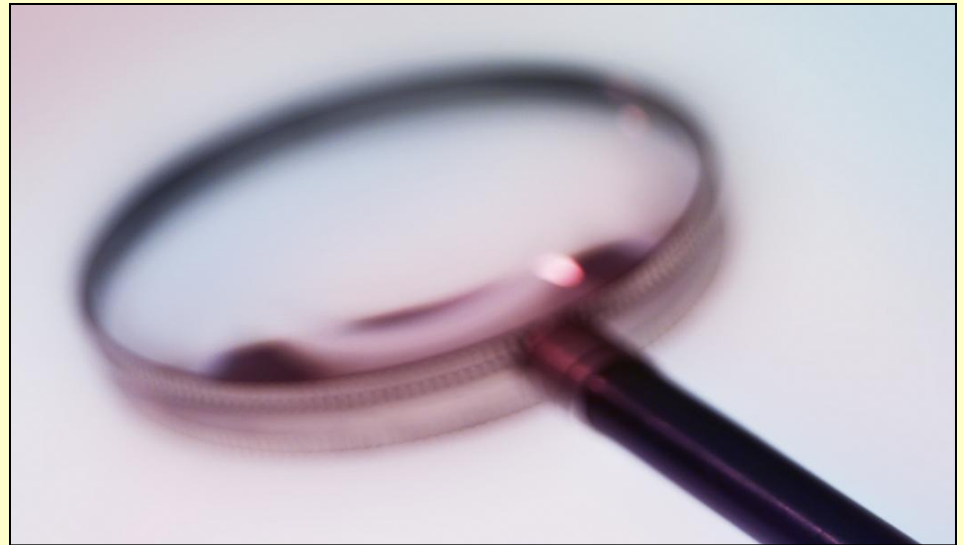
# **HRMS Activity**




## **Structure Display/Maintenance Walkthrough**

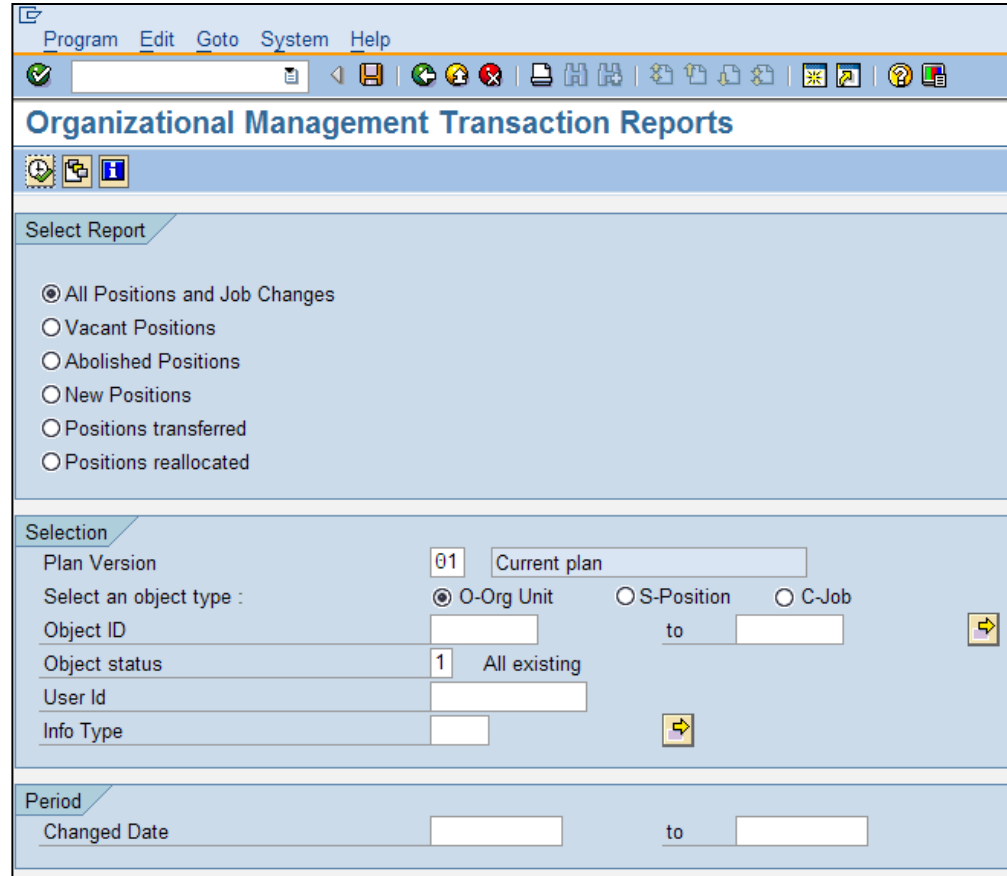
# Organizational Management Transaction Reports

- Use the report to run audits in Organizational Management.
- Run the report when analysis is needed.
- Access the reports using the transaction code **ZHR\_RPTOMN01**.



# Organizational Management Transaction Reports

- In the Select Report section, click the radio button to select the report to run.
- As required, complete the following:
  - Select an object type
  - Object ID
  - Period
- In the Period section, enter the Changed Date
- Click  (Execute).



The screenshot shows a software application window titled "Organizational Management Transaction Reports". The window has a menu bar with "Program", "Edit", "Goto", "System", and "Help". Below the menu bar is a toolbar with various icons. The main content area is divided into three sections: "Select Report", "Selection", and "Period".

**Select Report**

- ☒ All Positions and Job Changes
- ☐ Vacant Positions
- ☐ Abolished Positions
- ☐ New Positions
- ☐ Positions transferred
- ☐ Positions reallocated

**Selection**

Plan Version: 01 Current plan

Select an object type : ☒ O-Org Unit ☐ S-Position ☐ C-Job

Object ID: [ ] to [ ]

Object status: 1 All existing

User Id: [ ]

Info Type: [ ]

**Period**

Changed Date: [ ] to [ ]

# Organizational Management Transaction Reports

List Edit Goto Views Settings System Help

Organizational Management Transaction Reports

State of Washington - HRMS  
 All Position, Org Unit and Job changes

Report ID: ZHR\_RPTOMN01  
 User : JANETP  
 Run Date : 12/02/2008  
 Period : 07/01/2008 thru 12/01/2008

Info Type Number	Info Type Name	Object Type	Object Id Number	Object Abbr	Object Title	Effective Start Date	Effective End Date	Transaction Date	Created By	Planning Status	Status Title
1001	Relationships		30000491			10/01/2008	10/15/2008	10/02/2008	Z_OMPROC	1	Active


# IT1018 Position Cost Distribution

- Use the report to view the cost distribution for each position within your agency
- Run the report when analysis is needed.
- Access the reports using the transaction code **ZHR\_RPTFI1018.**





# IT1018 Position Cost Distribution

- As required, complete the following:
  - Report Effective Date
  - Business Area or Personnel Area
- Optional:
  - ALV Variant Name
- Click  (Execute)

Program Edit Goto System Help

IT1018 Position Cost Distribution

Effective Date  
Report Effective Date 10/01/2010

Position Selections

Business Area	1110	to		
Personnel Area		to		
Personnel SubArea		to		
Organization Unit		to		
Position Number		to		
Vacancy Status		to		

Infotype Selections

Fund		to		
Functional Area		to		
Cost Center		to		
Cost Object		to		
Project		to		
Allocation		to		

ALV Report Variant  
ALV Variant Name

# IT1018 Position Cost Distribution (1 of 4)

IT1018 Position Cost Distribution										
<p>State of Washington - HRMS</p> <p>IT1018 Position Cost Distribution</p> <p>Report ID: ZHR_RPTFI1018            User: JANETP            Run Date: 05/24/2010            Effective Date: 04/27/2010            Business Area: Include - 1110            Personnel Area: All</p>										
Business Area	Business Area Desc.	Personnel Area	Personnel Area Desc.	Personnel SubArea	Personnel SubArea Desc.	Organization Unit	Organization Unit Description	Position	Position Short Text	P
1110	Department of Personnel	1110	Dept of Personnel	0001	Non Represented	30000501	PERSONNEL SERVICES	70005801 0005		A
1110	Department of Personnel	1110	Dept of Personnel	0001	Non Represented	31006050	HUMAN RESOURCES	70005806 0011		H
1110	Department of Personnel	1110	Dept of Personnel	0001	Non Represented	31006060	SERVICE CENTER	70005812 0019		C
1110	Department of Personnel	1110	Dept of Personnel	0001	Non Represented	31006060	SERVICE CENTER	70005813 0020		O
1110	Department of Personnel	1110	Dept of Personnel	0001	Non Represented	31006053	COMBINED FUND DRIVE	70005819 0028		P
1110	Department of Personnel	1110	Dept of Personnel	0001	Non Represented	31006053	COMBINED FUND DRIVE	70005821 0031		O
1110	Department of Personnel	1110	Dept of Personnel	0001	Non Represented	31006052	COMMUNICATIONS	70005830 0043		IT
1110	Department of Personnel	1110	Dept of Personnel	0001	Non Represented	31006057	CLASSIFICATION	70005836 0053		H

# IT1018 Position Cost Distribution (2of4)

<div> <div>List Edit Goto Views Settings System Help</div> <div> </div> </div>											
IT1018 Position Cost Distribution											
<div> <div>State of Washington - HRMS</div> <div>IT1018 Position Cost Distribution</div> <div> <div>Report ID: ZHR_RPTFI1018</div> <div>User: JANETP</div> <div>Run Date: 05/24/2010</div> <div>Effective Date: 04/27/2010</div> <div>Business Area: Include - 1110</div> <div>Personnel Area: All</div> </div> </div>											
Position Title	Pos Start Date	Pos End D...	Vacancy Status	Cost Dist. Start	Cost Dist. End	Cost Center	Cost Center Desc.	Fund	Fund Desc.	Functional Area	Functional Ar
ADMIN ASST 3	06/01/2008	12/31/9999	2	01/16/2006	12/31/9999	11100000...	DEFAULT AGENCY 1...	11141550...	PERSONNEL SERVICES	1110410000000000	ADMINISTRA
HUM RES CNSLT 4	01/01/2005	12/31/9999	2	07/01/2009	12/31/9999	11100000...	DEFAULT AGENCY 1...	11141550...	PERSONNEL SERVICES	1110130000000000	HUMAN RES
CUST SVS SPEC 2	05/16/2008	12/31/9999	2	07/01/2007	12/31/9999	11100000...	DEFAULT AGENCY 1...	11141550...	PERSONNEL SERVICES	1110433200000000	CUSTOMER :
OFF ASST 2	05/01/2007	12/31/9999	2	07/01/2009	12/31/9999	11100000...	DEFAULT AGENCY 1...	11141550...	PERSONNEL SERVICES	1110433200000000	CUSTOMER :
PROG SPEC 2	01/01/2009	12/31/9999	2	07/01/2007	12/31/9999	11100000...	DEFAULT AGENCY 1...	11141550...	PERSONNEL SERVICES	1110221000000000	CFD - ADMIN
OFF ASST 3	11/01/2009	12/31/9999	2	07/01/2007	12/31/9999	11100000...	DEFAULT AGENCY 1...	11141550...	PERSONNEL SERVICES	1110221000000000	CFD - ADMIN
IT SPEC 4	06/01/2007	12/31/9999	2	01/16/2006	12/31/9999	11100000...	DEFAULT AGENCY 1...	11141550...	PERSONNEL SERVICES	1110140000000000	COMMUNICA
HUM RES CNSLT 4	05/11/2007	12/31/9999	2	07/01/2009	12/31/9999	11100000...	DEFAULT AGENCY 1...	11141550...	PERSONNEL SERVICES	1110422000000000	CLASSIFICAT

# IT1018 Position Cost Distribution

## (3of4)

<div> <div>List Edit Goto Views Settings System Help</div> <div> </div> </div>												
IT1018 Position Cost Distribution												
<div> <div> <div>State of Washington - HRMS</div> <div>IT1018 Position Cost Distribution</div> </div> <div> <div>Report ID: ZHR_RPTFI1018</div> <div>User: JANETP</div> <div>Run Date: 05/24/2010</div> <div>Effective Date: 04/27/2010</div> <div>Business Area: Include - 1110</div> <div>Personnel Area: All</div> </div> </div>												
Cost Object	Cost Object Desc.	Project	Project Desc.	Allocation	Allocation Desc.	Cost Dist Perce...	Budgeted	Retirement Eligi...	EE_GRP	EE Group Desc	EE_SGRP	EE
111000000000	DEFAULT AGENCY 1...	111000000000	DEFAULT AGENCY 111	1110000	DEFAULT AGENCY 1...	100.00	X	X	0	Permanent	06	M-C
111000000000	DEFAULT AGENCY 1...	111000000000	DEFAULT AGENCY 111	1110000	DEFAULT AGENCY 1...	100.00	X	X	0	Permanent	01	Mo
111000000000	DEFAULT AGENCY 1...	111000000000	DEFAULT AGENCY 111	1110000	DEFAULT AGENCY 1...	100.00	X	X	0	Permanent	06	M-C
111000000000	DEFAULT AGENCY 1...	111000000000	DEFAULT AGENCY 111	1110000	DEFAULT AGENCY 1...	100.00	X	X	0	Permanent	06	M-C
111000000000	DEFAULT AGENCY 1...	111000000000	DEFAULT AGENCY 111	1110000	DEFAULT AGENCY 1...	100.00	X	X	0	Permanent	01	Mo
111000000000	DEFAULT AGENCY 1...	111000000000	DEFAULT AGENCY 111	1110000	DEFAULT AGENCY 1...	100.00	X	X	0	Permanent	06	M-C
111000000000	DEFAULT AGENCY 1...	111000000000	DEFAULT AGENCY 111	1110000	DEFAULT AGENCY 1...	100.00	X	X	0	Permanent	01	Mo
111000000000	DEFAULT AGENCY 1...	111000000000	DEFAULT AGENCY 111	1110000	DEFAULT AGENCY 1...	100.00	X	X	0	Permanent	01	Mo



# **HRMS Activity**




**Position Cost Distribution (IT1018)–  
ZHR\_RPTFI0027 –  
Walk-through**

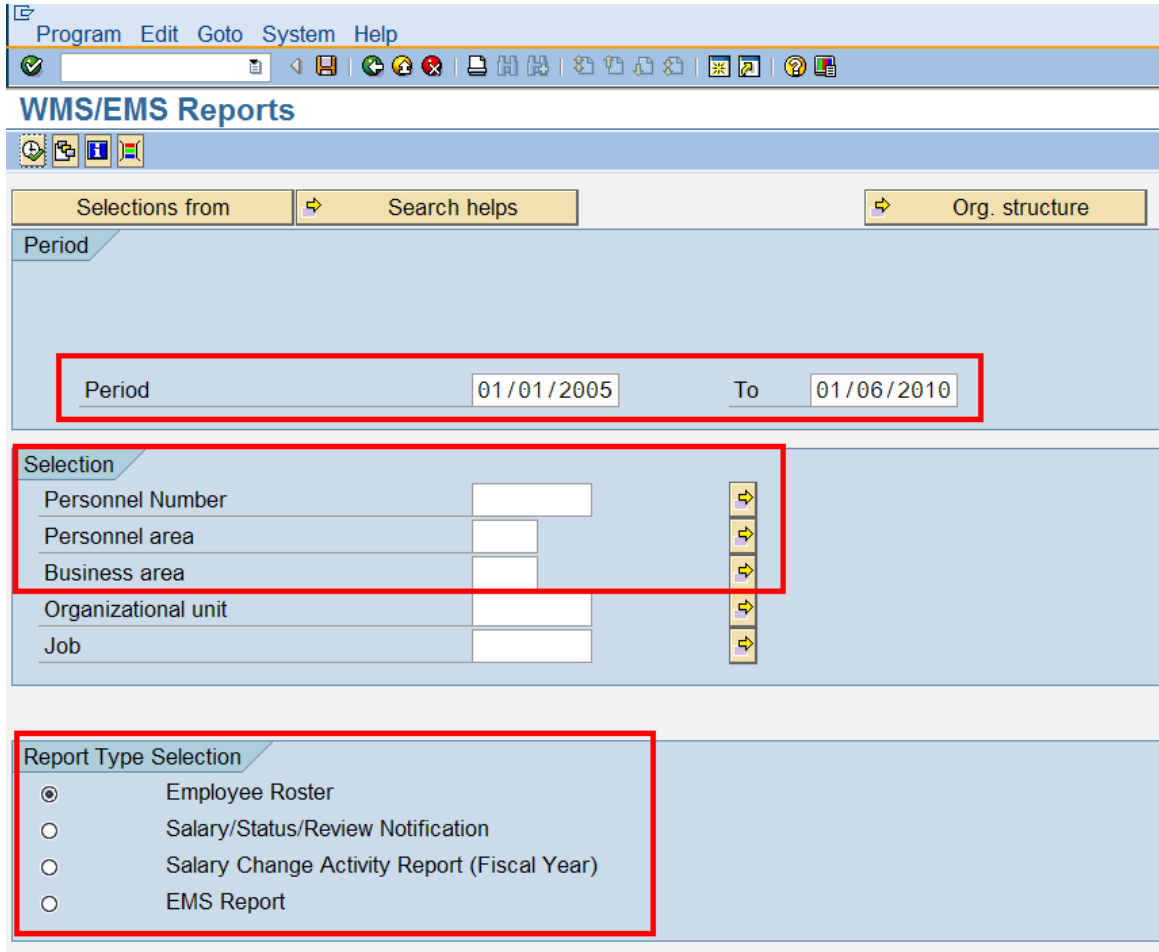
# WMS/EMS Reports

- Used to identify WMS and EMS employees in the agency as well as their salary, status and review notification.
- Access the report using the transaction code **ZHR\_RPTPA802**.



# WMS/EMS Reports

- As required, enter the Period
- Conditional selection criteria include:
  - **Personnel area**
  - **Business area**
- Choose a report type:
  - **Employee Roster**
  - **EMS Report**
- Click  (**Execute**) to execute the report.



Program Edit Goto System Help

## WMS/EMS Reports

Selections from Search helps Org. structure

Period

Period 01/01/2005 To 01/06/2010

Selection

Personnel Number		
Personnel area		
Business area		
Organizational unit		
Job		

Report Type Selection

- ☒ Employee Roster
- ☐ Salary/Status/Review Notification
- ☐ Salary Change Activity Report (Fiscal Year)
- ☐ EMS Report



# Viewing Results: Washington Management Services Employee Roster (1 of 2)

**SAP**

List Edit Goto Views Settings System Help

Washington Management Services Reports

### State of Washington - HRMS WMS Employee Roster

Report ID : ZHR\_RPTPA802  
User : JANETP  
Run Date : 12/08/2008  
Period : 12/01/2008 through 12/15/2008

Pers.Area	Job Number	Job Title	JVAC	Employee Name	Permr	Pers. Sub	Status	Term Date	Perm	Position	Position Title	Org Code
1110	50003921	WMS BAND 1	A2X-0452	<b>The Employee's Name and Personnel Numbers have been blocked for security purposes.</b>		0002	Active		Y	70005915	CONTRACTS ADMINISTRATOR	30000493
1110	50003921	WMS BAND 1	A2X-0452			0002	Active		Y	70005909	ASSESSMENT SERVICES MANAGER	30000502
1110	50003922	WMS BAND 2	B2X-0570			0002	Active		Y	70005869	COMMUNICATIONS MANAGER	30000492
1110	50003922	WMS BAND 2	B2W-0546			0002	Active		Y	70084260	HR CLIENT SERVICES MANAGER	30000492
1110	50003922	WMS BAND 2	B2W-0546			0002	Active		N	70005940	LEGISLATIVE LIAISON	30000508
1110	50003922	WMS BAND 2	B2X-0570			0002	Active		Y	70084251	RECRUITMENT INFRASTRUCTURE MANAGER	30000502

# Viewing Results: Washington Management Services Employee Roster – cont'd

<div> <div>List Edit Goto Views Settings System Help</div> <div> </div> </div> <div>Washington Management Services Reports</div> <div> </div> <div> <div>State of Washington - HRMS</div> <div>WMS Employee Roster</div> <div> Report ID : ZHR_RPTPA802  User : JANETP  Run Date : 12/08/2008  Period : 12/01/2008 through 12/15/2008 </div> </div>													
	Org Abbr.	Employee G	Contract	Effective	Reason	Reason Text	Pay Scale	Total Sala	Anniversary	Appointmen	WMS Review	Next Incre	Count
3	AB	Permanent	Permanent	09/01/2008	02	Rng Inc Due to Director Action	BAND 1	2,921.00	05/11/1991	09/01/2005	03/14/2006		1
3	AK	Permanent	Permanent	09/01/2008	02	Rng Inc Due to Director Action	BAND 1	2,805.50	01/28/2001	02/01/2005	02/01/2006		1
3	AA	Permanent	Permanent	09/01/2008	02	Rng Inc Due to Director Action	BAND 2	3,205.00	04/10/1978	07/25/1994	04/10/2004		1
3	AA	Permanent	Permanent	09/01/2008	02	Rng Inc Due to Director Action	BAND 2	2,960.50	01/01/1985	09/16/2008	12/01/2006		1
3	AT	Permanent	Probation	09/01/2008	02	Rng Inc Due to Director Action	BAND 2	2,767.50	12/17/2007	06/16/2008			1
3	AK	Permanent	Permanent	09/01/2008	02	Rng Inc Due to Director Action	BAND 2	2,903.50	05/02/1976	02/01/2007	01/01/2007		1

# HRMS Activity



**WMS Report – ZHR\_RPTPA802 –  
Walk-through**

# Other Organizational Management Reports (Business Intelligence)

- The following reports are available through Business Intelligence: (Please request assistance from your agency's Business Intelligence user when running these reports)
  - Position – Personnel Master Listing
  - Position Statistics Report
  - Position Roster
  - Supervisor to Employee

# Summary

You can now:

- Describe an overview of organizational management
- Explain the basic organizational management concepts and terms
- Perform the organizational unit and position exercises outlined in the Activity Guide
- Explain the organizational management integration with Personnel Administration
- Prepare organizational management reports

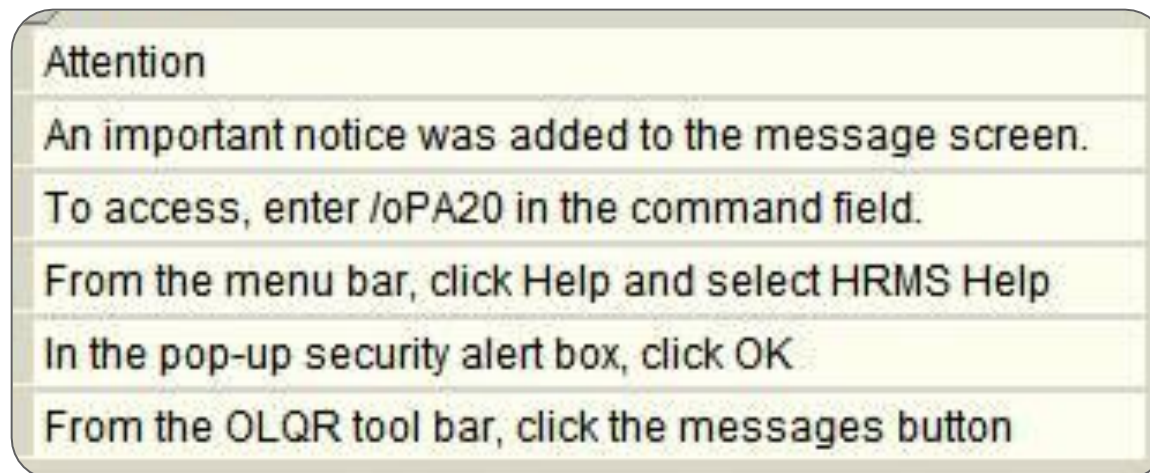
# HRMS Resources

## ■ The following resources are available for your use:

- DOP Service Center– (360) 664–6400
  - [ServiceCenter@dop.wa.gov](mailto:ServiceCenter@dop.wa.gov)
- The On-Line Quick Reference
  - <http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference/>
- HRMS Support Website
  - <http://www.dop.wa.gov/payroll/HRMS/HRMSSupport/Pages/default.aspx>
- HRMS Data Definitions
  - <http://pub/payroll/HRMS/OnLineQuickReference/Pages/DataDefinitions.aspx>

# ZAlert System Messages

- Messages are sent by the Department of Personnel Service Center and will appear when logged into the system or when first logging in.
  - ZAlerts will last up to 2 hours after being displayed. Once the message has expired you will no longer see the message.
- Messages will vary and may contain information regarding payroll pick-up or may direct you to the HRMS Message Center.



# Question and Answer





# Training Evaluation

- Please take a few minutes to complete the course evaluation prior to leaving.



**Thank you for  
your participation**

# Helpful Hints

The following section is used to provide users additional system information in HRMS.

- SOW Profile
- Structure Search
- OM Free Search



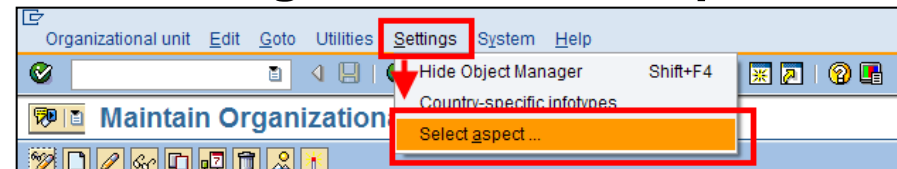
# Additional Information – SOW Profile

- To temporarily remove extra infotypes in **PO10**, **PO13** and **PO03**.
- Agency end-users have the ability to display State of Washington infotypes only by selecting an aspect.

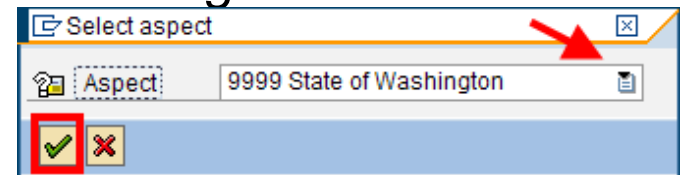
**Note:** Once the aspect has been selected for either transaction code, it will be available for the current login session.

## ■ How to:

1. From the transaction screen, go to the *Menu bar* and select **Settings** then **Select aspect**





2. The Select aspect window will appear, from the drop-down menu select *State of Washington*.

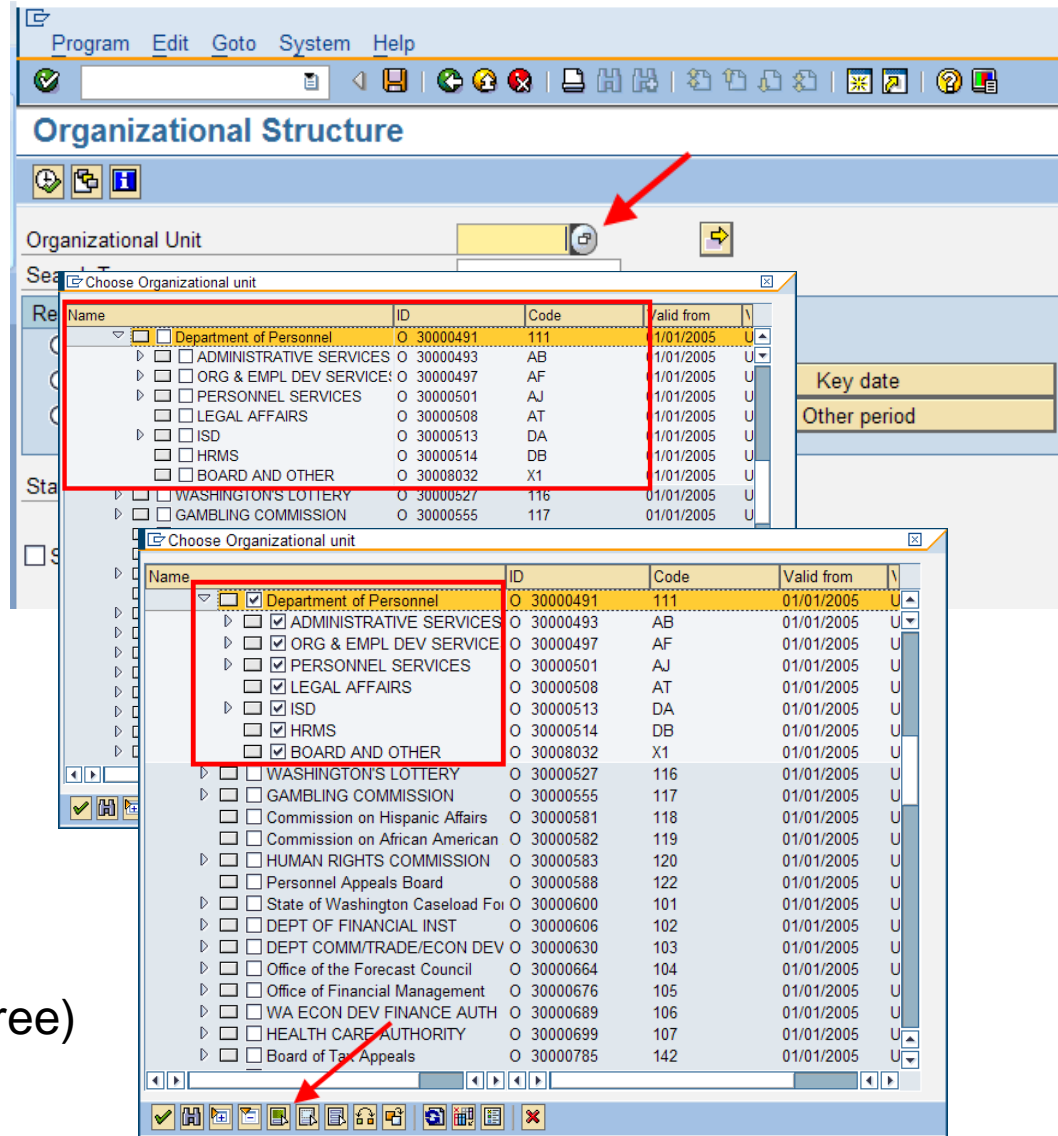


3. Click  (**Transfer**)

# Additional Information – Structure Search

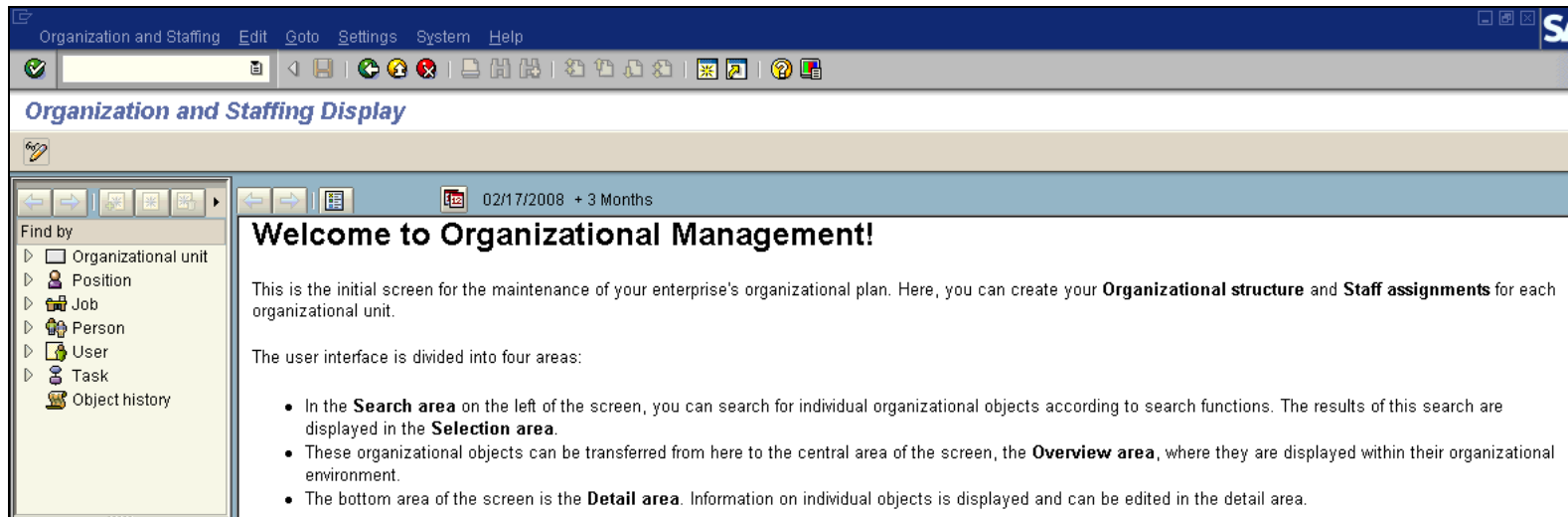
- Utilize the Structure Search option when looking up an Org Unit or Position Number.
  - Access Structure Search by clicking on the  matchcode in either the Org Unit or Position number field.
- Scroll down to find your selection.

**Note:** The  (Select Subtree) will allow you to make more than one selection.



# OM Free Search

- The OM Free Search provides you with an ADHOC query to search for information that reflects your business needs. Such as position vacancy information.
- To access this search, use the transaction code **PPOSE**.

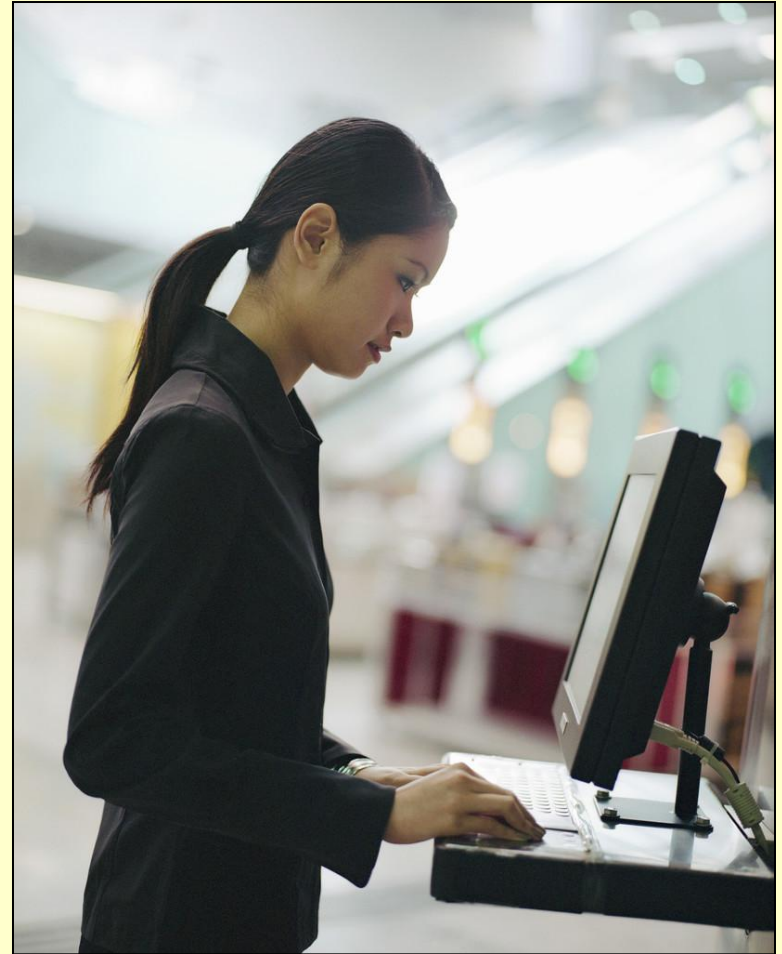


# Other Available Reports


- Here is a list of other OLQR User Procedures that have not been mentioned in the course:
  - Organizational Structure Report
  - Organizational Structure with Positions
  - Report Structure with Persons
  - Pay Grade Structure for Jobs
  - Organizational structure with Persons
  - Existing Jobs
  - Existing Positions

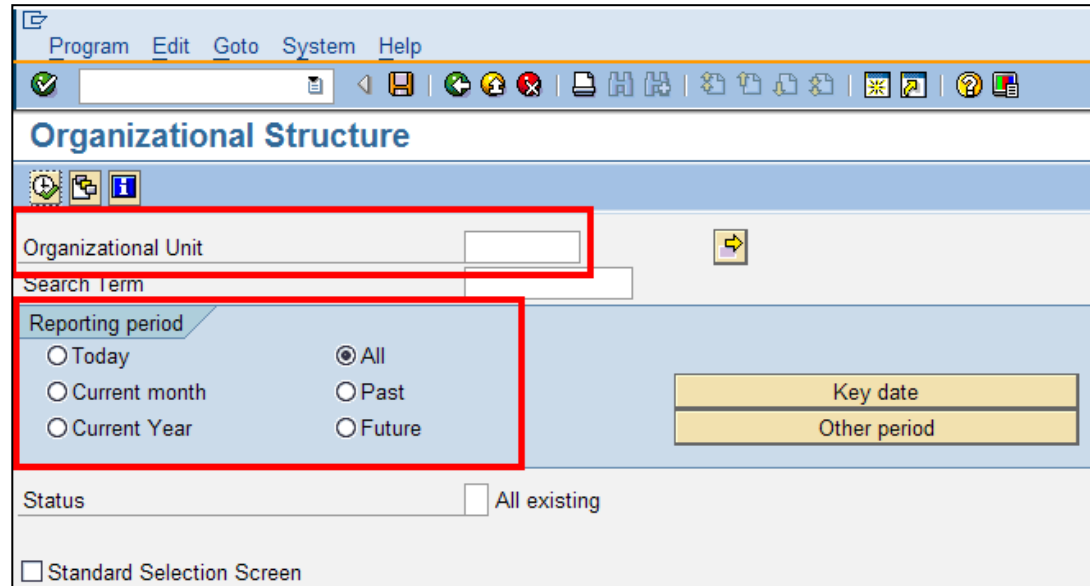
# Organizational Structure Report

- This report is used to view the hierarchy that exists between organizational units.
- Run the report when analysis on organizational structure is needed.
- Access the report using the transaction code **S\_AHR\_61016493**.



# Organizational Structure Report

1. As required, enter the Organizational Unit (use matchcode for ease of selection – see the *Additional Information* section for further instruction)
2. In the reporting period, select the radio button 'All'
3. Click  (Execute)



The screenshot shows a software interface titled "Organizational Structure". It features a menu bar with "Program", "Edit", "Goto", "System", and "Help". Below the menu is a toolbar with various icons. The main area contains the following elements:

- Organizational Unit:** A text input field with a matchcode icon (a yellow arrow pointing right) to its right. This field is highlighted with a red box.
- Search Term:** A text input field located below the Organizational Unit field.
- Reporting period:** A section containing two columns of radio buttons:
  - Left column: ☐ Today, ☐ Current month, ☐ Current Year
  - Right column: ☒ All, ☐ Past, ☐ FutureThis section is highlighted with a red box.
- Key date / Other period:** Two yellow buttons stacked vertically on the right side of the Reporting period section.
- Status:** A text input field with a checkbox labeled "All existing" to its right.
- Standard Selection Screen:** A checkbox at the bottom left of the screen.

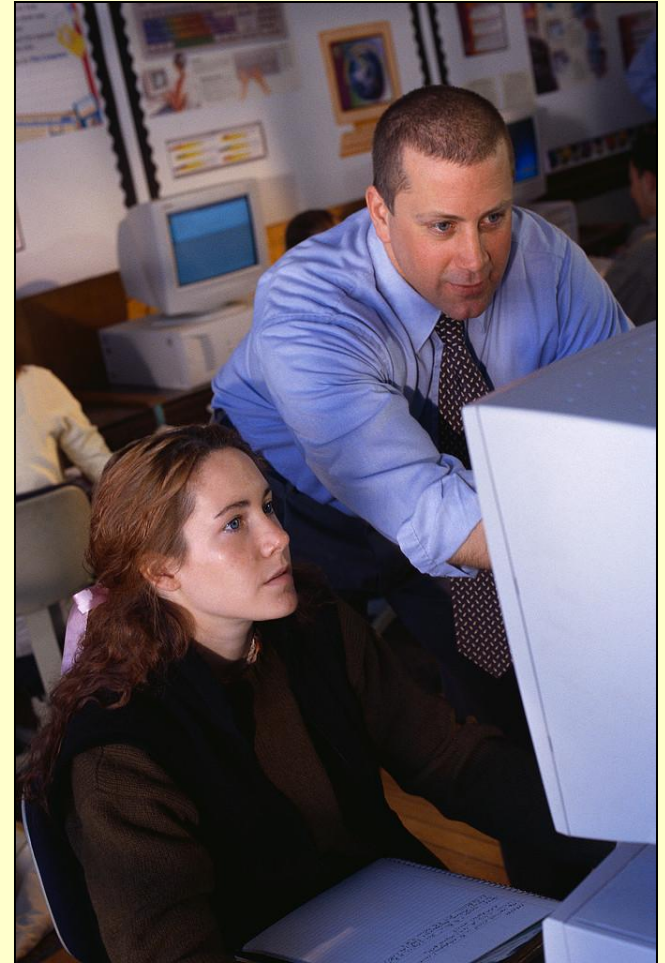


# Viewing Results: Organizational Structure Report


Structure Display							
Structure Display/Maintenance							
Plan Version: 01 Evaluation Path: ORGEH (Organizational structure) Depth: 0 Status Vector: 1 Evaluation Period: 01/01/1900 - 12/31/9999							
Object Description	Object abbr.	Object Type	Extended object ID	Status (Object)	Start Date (Object)	End Date (Object)	Status (Relationship)
Department of Personnel	111	O	30000491	1	01/01/2005	12/31/9999	
ADMINISTRATIVE SERVICES	AB	O	30000493	1	01/01/2005	12/31/9999	1
CLIENT SERVICES	AM	O	30000504	1	01/01/2005	12/31/9999	1
ORG & EMPL DEV SERVICES a	AF	O	30000497	1	01/01/2005	12/31/9999	1
PASION ORG UNIT	TEST-JP	O	31003400	1	06/01/2008	12/31/9999	1
CLASSIFIED ORG UNIT	AG	O	30000498	1	01/01/2005	01/16/2006	1
PERSONNEL SERVICES	AJ	O	30000501	1	01/01/2005	12/31/9999	1
RECRUITMENT & ASSESSMENT	AK	O	30000502	1	01/01/2005	12/31/9999	1
CLASSIFICATION & COMPENSATION	AL	O	30000503	1	01/01/2005	12/31/9999	1
CLIENT SERVICES	AM	O	30000504	1	01/01/2005	12/31/9999	1
RECRUITMENT & ASSESSMENT	AK	O	30000502	1	01/01/2005	12/31/9999	1
CLASSIFICATION & COMPENSATION	AL	O	30000503	1	01/01/2005	12/31/9999	1
CLIENT SERVICES	AM	O	30000504	1	01/01/2005	12/31/9999	1
CLASSIFIED ORG UNIT	AN	O	30000505	1	01/01/2005	01/16/2006	1
CLASSIFIED ORG UNIT	AR	O	30000506	1	01/01/2005	01/16/2006	1
CLASSIFIED ORG UNIT	AS	O	30000507	1	01/01/2005	01/16/2006	1
LEGAL AFFAIRS	AT	O	30000508	1	01/01/2005	12/31/9999	1
111 A	111 A	O	30000509	1	01/01/2005	01/16/2006	1
111 D	111 D	O	30000510	1	01/01/2005	02/28/2007	1
ISD	DA	O	30000513	1	01/01/2005	12/31/9999	1
Test 01 - HRD org	Test 01 org	O	31003325	1	03/28/2008	05/15/2008	1

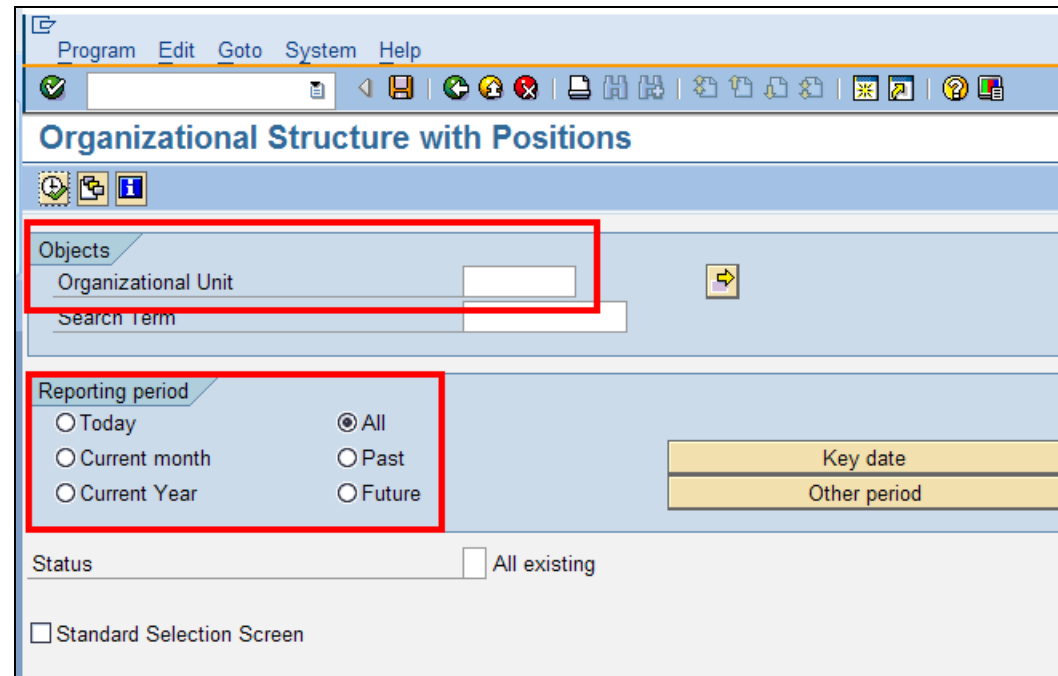
# Organizational Structure with Positions

- Use to view how positions relate to organizational units.
- Run the report when analysis on organizational structure with positions is needed.
- Access the report using the transaction code **S\_AHR\_61016494**.



# Organizational Structure with Positions

1. As required, enter the Organizational Unit (use matchcode for ease of selection – see the *Additional Information* section for further instruction)
2. In the reporting period, select the radio button 'All'
3. Click  (Execute)



Program Edit Goto System Help

**Organizational Structure with Positions**

Objects

Organizational Unit

Search Term

Reporting period

☐ Today ☒ All

☐ Current month ☐ Past

☐ Current Year ☐ Future

Key date

Other period

Status ☐ All existing

☐ Standard Selection Screen

# Viewing Results: Organizational Structure with Positions

Structure Display Edit Goto System Help

Structure Display/Maintenance

Plan Version: 01  
 Evaluation Path: PLSTE (Position overview along organizational structure)  
 Depth: 0  
 Status Vector: 1  
 Evaluation Period: 01/01/1900 - 12/31/9999

Object Description	Object abbr.	Object Type	Extended object ID	Status (Object)	Start Date (Object)	End Date (Object)	Status (Relationship)	Start Date ...	End Date (Rela ...	Percenta ...
Department of Personnel	111	O	30000431	1	01/01/2005	12/31/9999				
HUM RES CNSLT 2	0107	S	70005860	1	01/01/2005	12/31/9999	1	01/01/2005	01/15/2006	
NON-CLASSIFIED POSITION Z1Z1Z		S	70005902	1	01/01/2005	01/16/2006	1	01/01/2005	01/16/2006	
NON-CLASSIFIED POSITION Z1Z1Z		S	70005963	1	01/01/2005	01/16/2006	1	01/01/2005	01/16/2006	


**Note:** There may be additional information that is currently not displayed due to the size of your screen display, use the bar at the bottom of the screen to scroll to get to view the information.

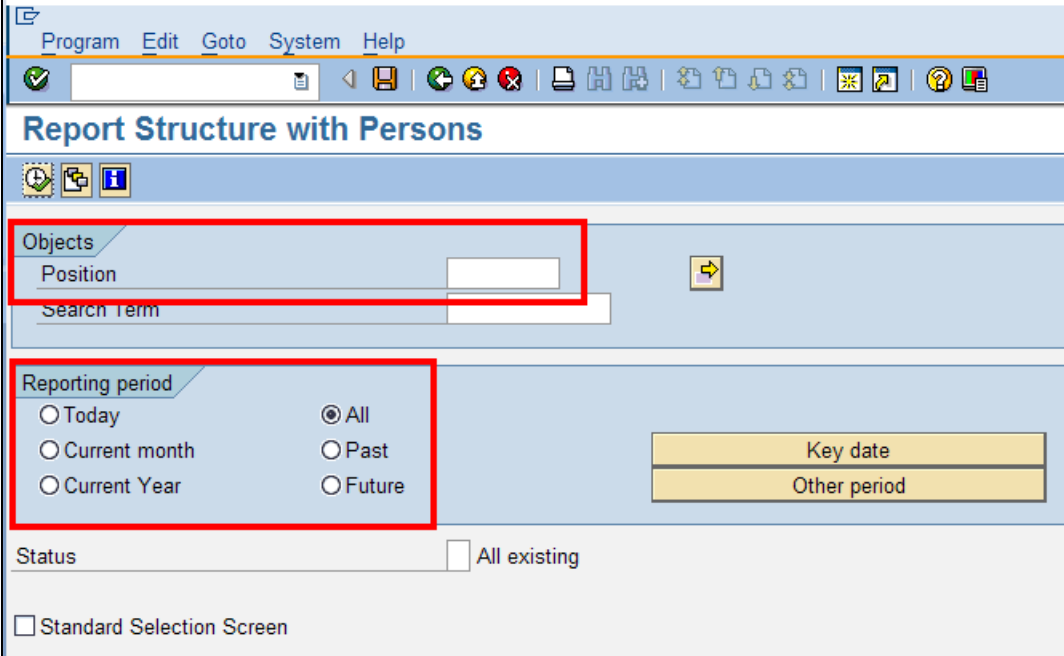
# Report Structure with Persons

- Use to view the hierarchy that exists between positions and includes the employees that are assigned to the positions.
- Run the report when analysis on organizational structure with positions and employees is needed.
- Access the report using the transaction code **S\_AHR\_61016513**.



# Report Structure with Persons

1. As required, enter the Position number (use matchcode for ease of selection – see the *Additional Information* section for further instruction)
2. In the reporting period, select the radio button 'All'
3. Click  (Execute)



Program Edit Goto System Help

Report Structure with Persons

Objects

Position

Search term

Reporting period

☐ Today ☒ All

☐ Current month ☐ Past


☐ Current Year ☐ Future

Key date

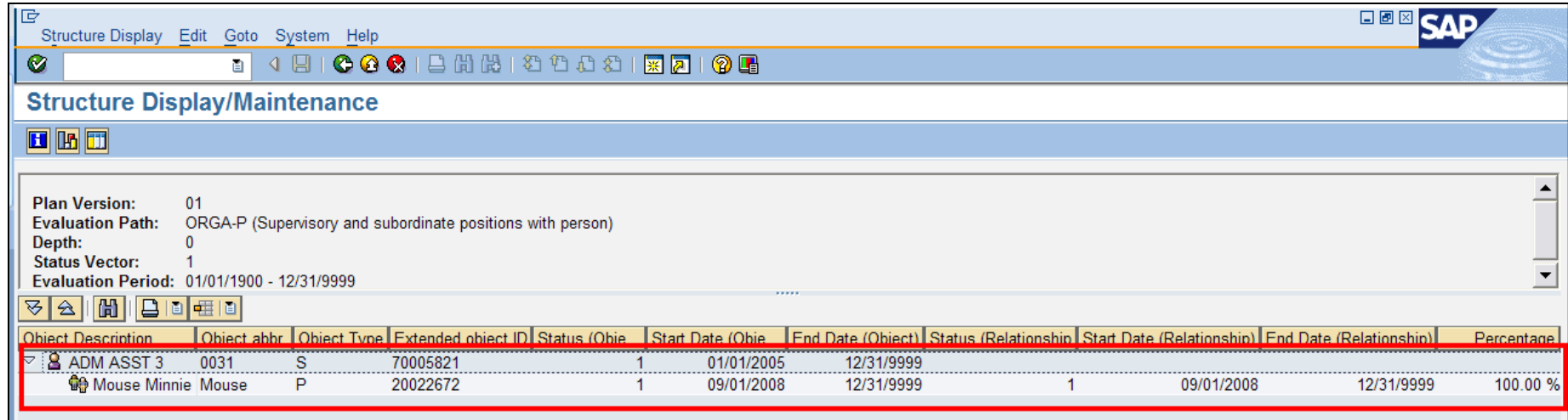
Other period

Status ☐ All existing

☐ Standard Selection Screen

**Note:** When selecting more than one object, utilize the  (Select Subtree) function found in the Structure Search.

# Viewing Results: Report Structure with Persons



The screenshot shows the SAP Structure Display/Maintenance window. The title bar includes 'Structure Display', 'Edit', 'Goto', 'System', and 'Help'. The menu bar contains 'Structure Display', 'Edit', 'Goto', 'System', and 'Help'. The toolbar includes icons for various functions. The main area displays the following information:

Plan Version: 01  
Evaluation Path: ORGA-P (Supervisory and subordinate positions with person)  
Depth: 0  
Status Vector: 1  
Evaluation Period: 01/01/1900 - 12/31/9999

Below this information is a table with the following columns: Object Description, Object abbr, Object Type, Extended object ID, Status (Object), Start Date (Object), End Date (Object), Status (Relationship), Start Date (Relationship), End Date (Relationship), and Percentage.

Object Description	Object abbr	Object Type	Extended object ID	Status (Object)	Start Date (Object)	End Date (Object)	Status (Relationship)	Start Date (Relationship)	End Date (Relationship)	Percentage
ADM ASST 3	0031	S	70005821	1	01/01/2005	12/31/9999				
Mouse Minnie Mouse	Mouse	P	20022672	1	09/01/2008	12/31/9999	1	09/01/2008	12/31/9999	100.00 %


# Pay Grade Structure for Jobs

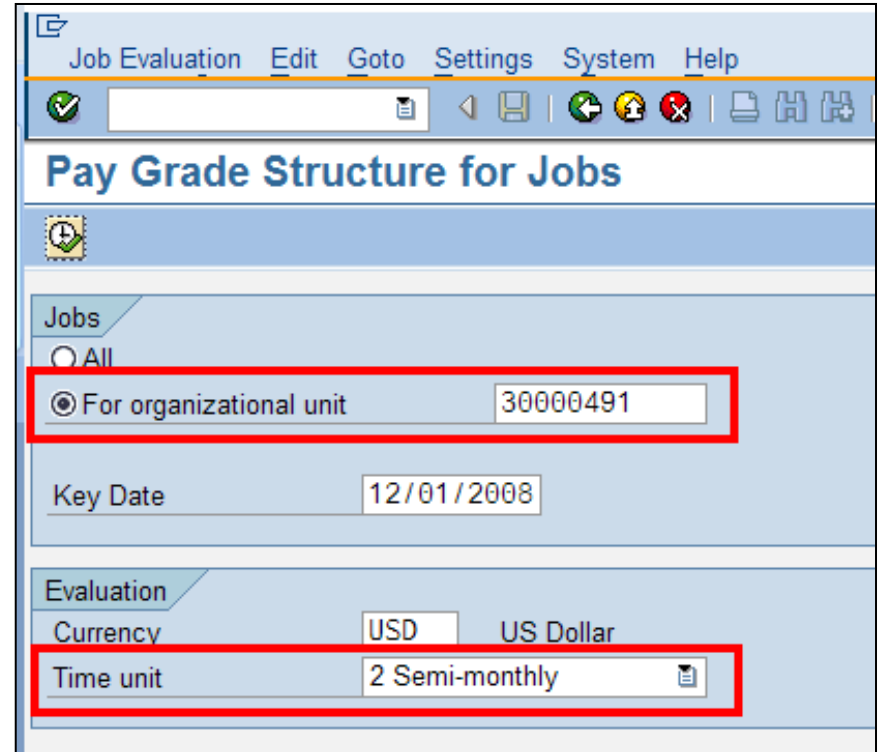
- Use the report to display the pay grade type, area, grade and level associated with a job.
- Run the report when analysis is needed.
- Access the report using the transaction code **S\_AHR\_61018797**.





# Pay Grade Structure for Jobs

- Complete the following required fields:
  - For organizational unit
    - Use matchcode
  - Key Date
  - Time Unit
    - *Semi-monthly*
- Click  **(Execute)**



Job Evaluation Edit Goto Settings System Help

Pay Grade Structure for Jobs

Jobs

☐ All

☒ For organizational unit 30000491

Key Date 12/01/2008

Evaluation

Currency USD US Dollar

Time unit 2 Semi-monthly

# Viewing Results: Pay Grade Structure for Jobs


<div> <div>Job evaluation Edit Goto Extras System Help</div> <div> </div> </div>									
Pay Grade Structure for Jobs									
<div> <div>Key Date</div> <div>12/01/2008</div> </div>									
<div> <div>Currency</div> <div>USD</div> </div>									
<div> <div>Time unit</div> <div>2 Semi-monthly</div> </div>									
<div> </div>									
Job	Pay grade type	Pay grade area	Pay grade	MinLvl	MaxLvl	Reference salary	Min. grade level	Max. grade level	
<a href="#">A/D CL &amp; EMP REL</a>	Non-Represented	EMS	BAND 4	04	04	0.00	3,058.33	5,270.00	
<a href="#">A/D HUM RS INF S</a>	Non-Represented	EMS	BAND 4	04	04	0.00	3,058.33	5,270.00	
<a href="#">A/D MGT/ADM SVS</a>	Non-Represented	EMS	BAND 3	03	03	0.00	2,551.46	4,547.00	
<a href="#">A/D PERS SVS</a>	Non-Represented	EMS	BAND 4	04	04	0.00	3,058.33	5,270.00	
<a href="#">AD. ORG &amp; EMP DEV SVS</a>	Non-Represented	EMS	BAND 4	04	04	0.00	3,058.33	5,270.00	
<a href="#">COMM QUAL IMP MG</a>	Non-Represented	EMS	BAND 3	03	03	0.00	2,551.46	4,547.00	
<a href="#">CONF. SECRETARY</a>	Non-Represented	Non-Pay Scale	01	01	01	0.00	0.00	16,666.00	
<a href="#">DEP DIR PERS</a>	Non-Represented	EMS	BAND 5	05	05	0.00	3,713.54	6,035.00	
<a href="#">DEPUTY ASST DIRECTOR F...</a>	Non-Represented	EMS	BAND 3	03	03	0.00	2,551.46	4,547.00	
<a href="#">DIRECTOR</a>	Non-Represented	Non-Pay Scale	01	01	01	0.00	0.00	16,666.00	
<a href="#">DIRECTOR OF COMMUNICA...</a>	Non-Represented	EMS	BAND 3	03	03	0.00	2,551.46	4,547.00	
<a href="#">DOP BOARD MEMBER</a>	Non-Represented	Board Members	01	01	01	0.00	0.00	8,333.00	
<a href="#">HUM RES MGR DOP</a>	Non-Represented	EMS	BAND 2	02	02	0.00	2,200.00	4,037.00	
<a href="#">SPECIAL ASSISTANT, DOP</a>	Non-Represented	EMS	BAND 2	02	02	0.00	2,200.00	4,037.00	
<a href="#">TEST MONITOR</a>	Non-Represented	Non-Pay Scale	01	01	01	0.00	0.00	16,666.00	
<a href="#">WMS BAND 1</a>	Non-Represented	WMS	BAND 1	01	01	0.00	1,666.67	3,400.00	
<a href="#">WMS BAND 2</a>	Non-Represented	WMS	BAND 2	02	02	0.00	2,200.00	4,037.00	
<a href="#">WMS BAND 3</a>	Non-Represented	WMS	BAND 3	03	03	0.00	2,551.46	4,547.00	

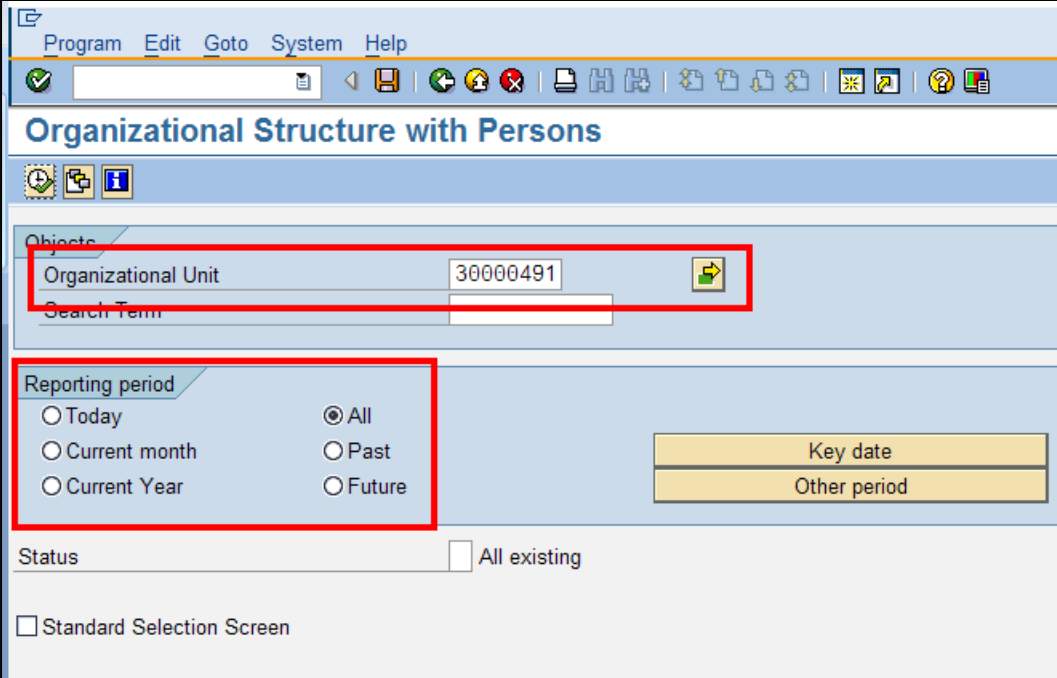
# Organizational Structure with Persons

- Use the report to view employees in Organizational Units.
- Run the report when analysis is needed.
- Access the reports using the transaction code **S\_AHR\_61016495**.



# Organizational Structure with Persons

- As required, enter the *Organizational unit* (use matchcode for ease of selection)
- In the *Reporting period*, select the radio button 'All'
- Click  (Execute)



Program Edit Goto System Help

Organizational Structure with Persons

Objects

Organizational Unit 30000491

Reporting period

☐ Today ☒ All

☐ Current month ☐ Past

☐ Current Year ☐ Future

Status ☐ All existing

☐ Standard Selection Screen

Key date

Other period

# Organizational Structure with Persons

Structure Display Edit Goto System Help

Structure Display/Maintenance

Plan Version: 01  
 Evaluation Path: PERS-O (Persons along an organizational structure)  
 Depth: 0  
 Status Vector: 1  
 Evaluation Period: 01/01/1900 - 12/31/9999


Object Description	Object abbr.	Object Type	Extended object ID	Status (Object)	Start Date (Object)	End Date (Object)	Status (Relationship)
Department of Personnel	111	O	30000491	1	01/01/2005	12/31/9999	
DIRECTOR'S OFFICE	AA	O	30000492	1	01/01/2005	12/31/9999	1
ADMINISTRATIVE SERVICES	AB	O	30000493	1	01/01/2005	12/31/9999	1
ORG & EMPL DEV SERVICES	AF	O	30000497	1	01/01/2005	12/31/9999	1
John Doe 04000000	Doe 04000000	P	04000000	1	01/01/2005	12/31/9999	1
CLASSIFIED ORG UNIT	AG	O	30000498	1	01/01/2005	01/16/2006	1
PERSONNEL SERVICES	AJ	O	30000501	1	01/01/2005	12/31/9999	1
RECRUITMENT & ASSESSMENT	AK	O	30000502	1	01/01/2005	12/31/9999	1
CLASSIFICATION & COMPENSATION	AL	O	30000503	1	01/01/2005	12/31/9999	1
CLIENT SERVICES	AM	O	30000504	1	01/01/2005	12/31/9999	1
RECRUITMENT & ASSESSMENT	AK	O	30000502	1	01/01/2005	12/31/9999	1
CLASSIFICATION & COMPENSATION	AL	O	30000503	1	01/01/2005	12/31/9999	1

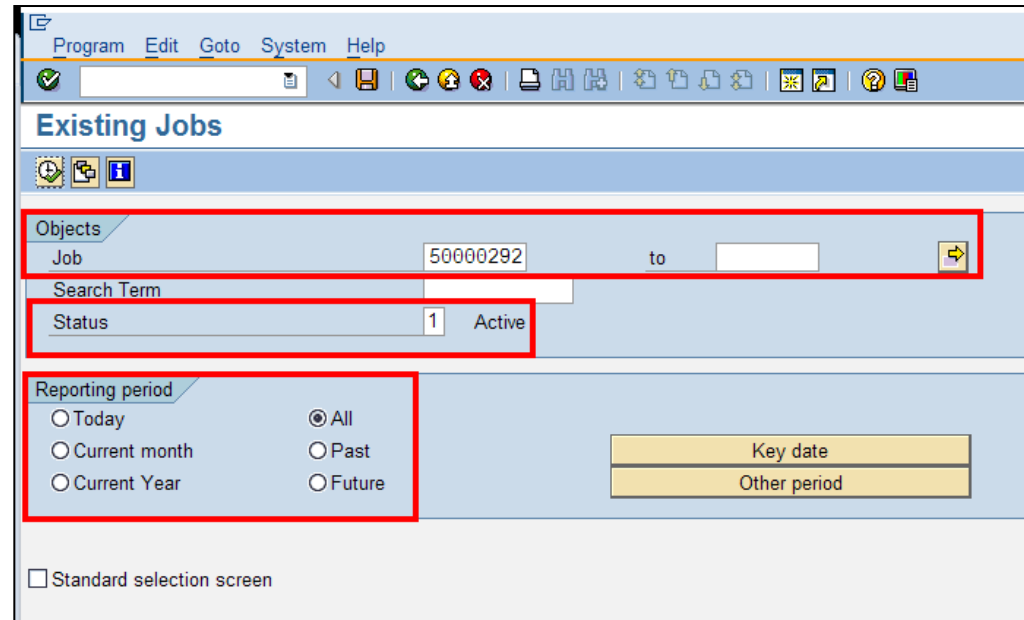
# Existing Jobs

- Use the report to generate an overview of all existing jobs.
- Run the report when analysis is needed.
- Access the report using the transaction code **S\_AHR\_61016497**.



# Existing Jobs

1. As required, enter the following fields
  - Job (use matchcode for ease of selection)
  - Status (1 – Active)
2. In the reporting period, select the radio button 'All'
3. Click  (Execute)



Program Edit Goto System Help

Existing Jobs

Objects

Job 50000292 to

Search Term

Status 1 Active

Reporting period

☐ Today ☒ All

☐ Current month ☐ Past

☐ Current Year ☐ Future

Key date

Other period

☐ Standard selection screen

**Note:** You may also search for Jobs by using the Search Term field.

# Viewing Results: Existing Jobs

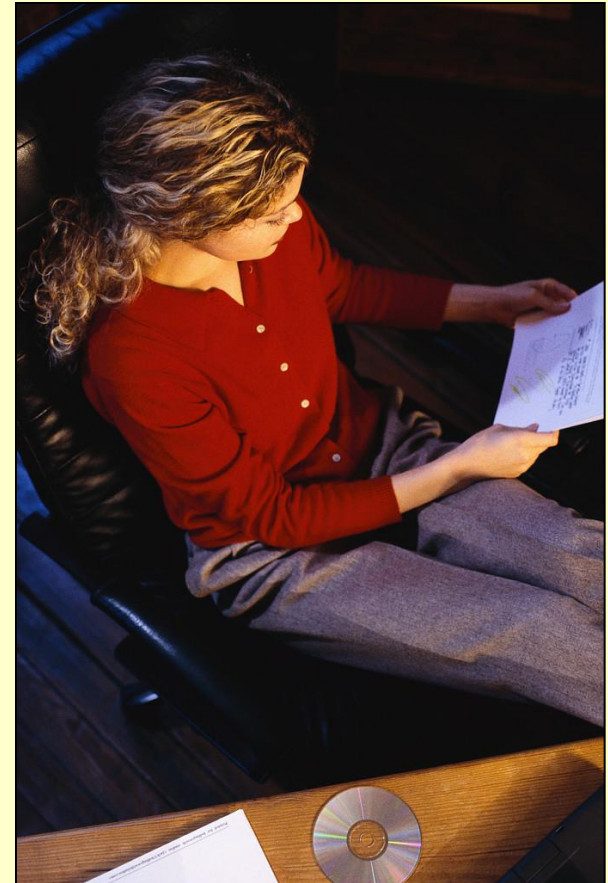
The screenshot shows a software application window with a menu bar (List, Edit, Goto, Views, Settings, System, Help) and a toolbar. Below the toolbar is a section titled "Existing Objects" with its own toolbar. The main area displays a table titled "Existing objects" with the following data:

OT	Start date	End Date	Object name	Abbr.	Object ID	S
C	01/01/2005	12/31/9999	CUST SVS SPEC 2	102B	50000292	1




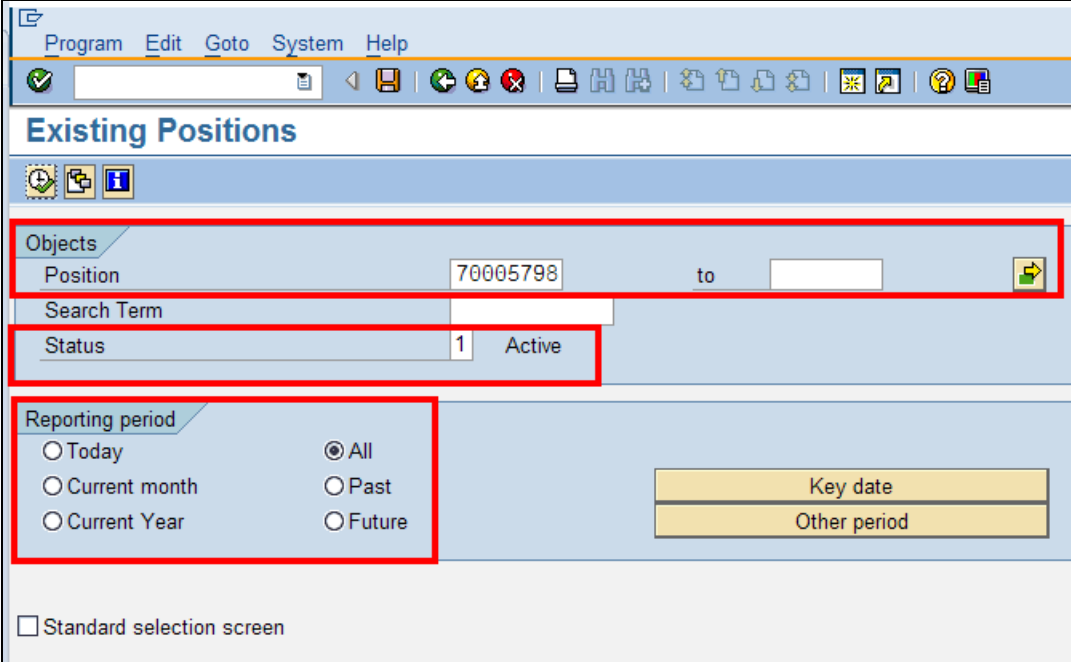
# Existing Positions

- Use the report to generate an overview of all existing positions.
- Run the report when analysis is needed.
- Access the report using the transaction code **S\_AHR\_61016502** .



# Existing Positions

- As required, enter the following fields
  1. Position (use matchcode for ease of selection)
  2. Status (1 – Active)
  3. In the reporting period, select the radio button 'All'
  4. Click  (Execute)



Program Edit Goto System Help

**Existing Positions**

Objects

Position 70005798 to

Search Term

Status 1 Active

Reporting period

☐ Today ☒ All


☐ Current month ☐ Past

☐ Current Year ☐ Future

Key date

Other period

☐ Standard selection screen

**Note:** When selecting more than one object, utilize the  (Select Subtree) function found in the Structure Search.

# Viewing Results: Existing Positions

Existing Objects						
Existing objects						
OT	Start date	End Date	Object name	Abbr.	Object ID	S
S	01/01/2005	12/31/9999	DIRECTOR	0001	70005798	1
S	01/01/2005	12/31/9999	HUM RES CNSLT 1	0002	70005799	1
S	01/01/2005	12/31/9999	ADMIN ASST 3	0005	70005801	1
S	01/01/2005	12/31/9999	OFF ASST 3	0009	70005805	1
S	01/01/2005	12/31/9999	HUM RES CNSLT 4	0011	70005806	1
S	01/01/2005	12/31/9999	HUM RES CNSLT 1	0018	70005811	1
S	01/01/2005	12/31/9999	CUST SVS SPEC 2	0019	70005812	1
S	01/01/2005	12/31/9999	OFF ASST 2	0020	70005813	1
S	01/01/2005	12/31/9999	HUM RES CNSLT 3	0024	70005815	1
S	01/01/2005	12/31/9999	HUM RES CNSLT 4	0025	70005816	1
S	01/01/2005	12/31/9999	CLASS & COMP PROGRAM DIRECTOR	0026	70005817	1
S	01/01/2005	12/31/9999	PROG SPEC 3	0028	70005819	1